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ABSTRACT

This V-TECS (Vocational-Technical Consortium of States) Guide is an extension or continuation of the V-TECS catalog for the occupation of medical assistant. The guide is designed to help South Carolina teachers to promote the art of learning while teaching subject matter. The guide addresses the three domains of learning: psychomotor, cognitive, and affective. This guide contains seven units of study that cover the following aspects of the medical assistant occupation: general office procedures, office management, accounting, government forms, insurance and other financial reports, laboratory procedures, sterilization and aseptic techniques, and clinical office procedures. Each unit contains several performance objectives, each including task, standard of performance of task, source of standard, conditions for performance of task, enabling objectives, resources, teaching activities, checklists, and criterion-referenced measures. Appendixes provide a task list and job titles; definitions of terms; equipment and tools list; and bibliography compiled by the South Carolina writing team. (KC)

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V-TECS GUIDE
FOR
MEDICAL ASSISTANT

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INTRODUCTION

A V-TECS Guide is an extension or a continuation of one or more V-TECS Catalogs. The V-TECS Catalog is a composition of duties, tasks, performance objectives, and performance guides which deal with the psychomotor aspect of an occupation. The catalog can be considered the blueprint of an occupation.

The catalog serves as the foundation for the V-TECS Guide. Experience has shown that the art of learning can be taught while teaching subject matter. A V-TECS Guide provides an efficient method for this process. The Guide addresses the three domains of learning: psychomotor, cognitive, and affective. The following is a brief explanation of each.

Psychomotor

Manipulative skills, such as sharpening a pencil and making a bulletin board display, are representative of activities that are psychomotor in nature. These tasks are identified in a catalog and grouped by duties and objectives. Each performance objective has a performance standard which must be met to demonstrate student proficiency in the manipulative aspect of the task.

Cognitive

Cognition is the mental process by which knowledge is acquired. To perform psychomotor tasks, students must think. Effective thinking is necessary for successful performance of job tasks. Students gain cognition through real and vicarious experiences. This guide enables the instructor to provide decision-making opportunities for students, thus developing their cognitive skills.

Affective

The affective domain deals with attitudes, interests, and values development. Desirable behavior is the learning outcome of the affective domain. This guide presents activities created to promote an understanding of self and others in a working environment. The instructor is encouraged to use the activities to stress how attitudes, values, and goal attainment influence working relationships and productivity.

USE OF V-TECS GUIDE

A V-TECS Guide is designed to provide job-relevant tasks, performance objectives, performance guides, resources, teaching activities, evaluation standards, and criterion-referenced measures. It may be used with any teaching method the instructor chooses. Although a guide contains suggestions for specific classroom activities for each identified task, teachers are encouraged to be creative in adapting the material to meet the particular needs of their students.

PERFORMING GENERAL OFFICE PROCEDURES

DUTY PERFORMING GENERAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 1

TASK

Place and receive telephone calls.

STANDARD OF PERFORMANCE OF TASK

One telephone call must be placed and one incoming telephone call handled, using standards included in the checklist.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Telephone
Telephone book
Telephone message pads

ENABLING OBJECTIVES

1. Have knowledge of telephone usage.
2. Be able to hold telephone correctly.

RESOURCES

1. Simmer. **Diversified Health Occupations**, 2nd edition, pp. 475-78.
2. Simmer. **Workbook for Diversified Health Occupations**, 2nd edition, pp 441-44.

TEACHING ACTIVITIES

1. Assign pages 475-78 for reading in **Diversified Health Occupations** and discuss telephone usage.
2. Complete assignment in **Workbook for Diversified Health Occupations** on pages 441-44.
3. Demonstrate the correct telephone technique used in a medical office.
4. Assign student to demonstrate in class correct telephone technique.
5. Assign student to complete a minimum of three telephone practice assignments. Each practice is to be checked by other students for correctness.

PERFORMANCE OBJECTIVE 1

CRITERION-REFERENCED MEASURE

Practical Application

Given the proper equipment, the student will place and receive telephone calls.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 1

PLACE AND RECEIVE TELEPHONE CALLS

Student's Name Date

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED		RATING	
		Acceptable	Unacceptable
1.	Assembled equipment.		
2.	Answered telephone promptly with a smile; identified agency and self.		
3.	Determined who was calling.		
4.	Asked caller to spell name or checked name correctly.		
5.	Determined purpose of call.		
6.	Obtained all pertinent information.		
7.	Screened calls correctly.		
8.	Used the following voice qualities while talking: low pitched,clear, and distinct.		
9.	Used correct grammar.		
10.	Held telephone correctly.		
11.	Ended conversation by thanking caller, saying goodbye, and allowing caller to hang up first.		
12.	Recorded all information accurately on message pad.		

CHECKLIST FOR PERFORMANCE OBJECTIVE 1 (Continued)

PLACE AND RECEIVE TELEPHONE CALLS

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
13. Responded correctly to the following situations: a. caller refused to give name; b. caller refused to state purpose of call; c. caller wanted person who was not available; and d. caller had emergency and no one else was available.		

APPROVED: YES _____ NO ____

Evaluator's Signature   Date

DUTY PERFORMING GENERAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 2

TASK

Arrange for patient's admission to hospital.

STANDARD OF PERFORMANCE OF TASK

All information required by the hospital must be supplied and the patient must be informed of the hospital name, date and time of admission.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Doctor's orders
Patient information

ENABLING OBJECTIVES

1. Have knowledge of telephone usage.
2. Have general knowledge of hospital admitting policies.

RESOURCES

1. Simmer. **Diversified Health Occupations**, 2nd edition, pp. 475-78.
2. Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies**, p. 163.

TEACHING ACTIVITIES

1. Assign pages 475-78 in **Diversified Health Occupations** and discuss using the phone to refer patients to the hospital.
2. Assign page 163 in **Medical Assisting: Clinical and Administrative Competencies** and discuss hospital admitting procedures.
3. Demonstrate the correct telephone technique used with arranging for a patient's admission to the hospital.
4. Assign student to demonstrate in class correct telephone admitting technique.
5. Assign student to complete a minimum of three telephone practice assignments. Each practice is to be checked by other students for correctness.

PERFORMANCE OBJECTIVE 2

CRITERION-REFERENCED MEASURE

Practical Application

Given a telephone, orders from the doctor, and patient information, the student will arrange for patient's admission to the hospital.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 2

ARRANGE FOR PATIENT'S ADMISSION TO HOSPITAL

Student's Name **Date**

DIRECTIONS TO STUDENT	Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.
DIRECTIONS TO EVALUATOR	Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Determined the type of admission: emergency or routine, medical or surgical.		
2. Obtained required information about the patient and recorded medical history and admitting diagnosis on form supplied by hospital.		
3. Called the hospital and gave all necessary information. Did the following while speaking: a. used low pitched voice; b. used clear and distinct voice; c. appeared interested; d. used correct grammar; e. held telephone correctly; and f. ended conversation with a thank-you and a good-bye.		
4. Informed patient of admission information with a smile and reassurance.		

APPROVED: YES _____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 3

TASK

Arrange physician's travel accommodations.

STANDARD OF PERFORMANCE OF TASK

Travel accommodations must be arranged according to standards included in the checklist. The times, dates, type of transportation, and lodging reservations must be included in the arrangements.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Telephone and telephone book
Notepads
Physician's destination, time, dates, type of transportation, and choice of lodgings

ENABLING OBJECTIVES

1. Have knowledge of telephone usage.
2. Have general knowledge of making travel arrangements.

RESOURCE

Webster's Secretarial Handbook, 2nd edition, pp. 491-531.

TEACHING ACTIVITIES

1. Assign pages 491-531 in **Webster's Secretarial Handbook** for class discussion.
2. Discuss the usual types and methods of traveling done by physicians.
3. Have a guest speaker from a travel agency discuss the best and easiest methods of travel.
4. Instruct student to contact several travel agencies to determine the best and least expensive methods of traveling to San Francisco to a medical meeting.
5. Instruct student to demonstrate in class through role-play the correct method of arranging physician's travel accommodations.

PERFORMANCE OBJECTIVE 3

CRITERION-REFERENCED MEASURE

Practical Application

Given a travel plan, a phone book, and a telephone, the student will arrange for a doctor's accommodations.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 3

ARRANGE PHYSICIAN'S TRAVEL ACCOMMODATIONS

Student's Name **Date**

DIRECTIONS TO STUDENT	Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.
DIRECTIONS TO EVALUATOR	Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	**RATING**	
	Acceptable	**Unacceptable**
1. Determined the dates of trip, time of departure and return, mode of transportation, number in party, type of lodgings preferred, and costs.		
2. Arranged for and confirmed the necessary transportation and hotel reservations.		
3. Picked up tickets or arranged for their delivery.		
4. Recorded all necessary information (airlines, flight numbers) and gave one copy to the doctor. Filed second copy for emergency use.		

APPROVED: YES _____ NO _____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 4

TASK

Schedule patient appointments.

STANDARD OF PERFORMANCE OF TASK

Patients must be scheduled according to urgency and anticipated treatment time. The patients' names and telephone numbers must be entered in the appointment book in their proper spaces. All subsequent schedule changes must be noted in the appointment book.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Appointment book
Telephone and note pad
Appointment cards
Patient information

ENABLING OBJECTIVES

1. Know proper telephone usage.
2. Have general knowledge of time needed for procedures.
3. Have knowledge of physician's office and hospital schedules.

RESOURCES

1. Simmer. **Diversified Health Occupations**, 2nd edition, pp. 478-81.
2. Simmer. **Workbook for Diversified Health Occupations**, 2nd edition, pp. 445-51.
3. Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies**, pp. 166-67.
4. Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies, Competency-based Student Workbook**, pp. 69-73.

TEACHING ACTIVITIES

1. Assign pages 478-81 in **Diversified Health Occupations** and discuss scheduling patients .
2. Assign pages 166-67 in **Medical Assisting: Clinical and Administrative Competencies** and discuss scheduling.
3. Instruct student to interview a doctor's receptionist and write a report on the effect of proper scheduling and improper scheduling.

PERFORMANCE OBJECTIVE 4

TEACHING ACTIVITIES (continued)

4. Assign each student to complete a minimum of three scheduling practice assignments. Each practice is to be checked by other students for correctness.

CRITERION-REFERENCED MEASURE

Practical Application

Given an appointment book and scheduling responsibilities, the student will schedule the patient appointments.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 4

SCHEDULE PATIENT APPOINTMENTS

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	**RATING**	
	Acceptable	**Unacceptable**
1. Used pencil to complete all information.		
2. Listed day and date in correct area.		
3. Marked times unavailable for appointments with an X through time area.		
4. Printed all notations for appointments: a. scheduled correct time; b. scheduled on preferred day; c. printed name correctly; d. noted spouse's name if patient was married; and e. recorded purpose of the appointment.		
5. With arrows, marked out correct amount of time for each appointment.		
6. Printed all information clearly so that it was easy to read.		

APPROVED: YES ____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 5

TASK

Complete registration form and prepare a medical file for a new patient.

STANDARD OF PERFORMANCE OF TASK

All required information must be written without error on a registration form for a new patient. The new patient's medical file should include an index card of information on the patient and any other necessary forms.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Patient information
Registration form
File folder
Financial card
Any other forms the physician uses

ENABLING OBJECTIVES

1. Know general secretarial skills including typing.
2. Know office procedures.

RESOURCES

1. Simmer. **Diversified Health Occupations**, 2nd edition, pp. 481-86.
2. Simmer. **Workbook for Diversified Health Occupations**, 2nd edition, pp. 452-55.

TEACHING ACTIVITIES

1. Assign pages 481-86 in **Diversified Health Occupations** and discuss different ways to prepare files on patients.
2. Assign pages 452-55 in **Diversified Health Occupations Workbook** for class completion.
3. Have the class develop a patient's information sheet that could be used in a physician's office.
4. Assign student to demonstrate in class the correct method of starting a patient file.
5. Assign student to complete a minimum of three practice files. Each practice is to be checked by other students for correctness.

PERFORMANCE OBJECTIVE 5

CRITERION-REFERENCED MEASURE

Practical Application

Given a new patient and the necessary supplies, the student will complete a registration form and prepare a medical file for the patient.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 5

COMPLETE REGISTRATION FORM AND PREPARE A MEDICAL FILE FOR A NEW PATIENT

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Assembled equipment.		
2. Questioned patient in a private area.		
3. Completed statistical data sheet as follows: a. asked questions politely; b. spoke clearly and distinctly; c. rechecked and repeated numbers for accuracy; d. typed or printed all information neatly and legibly; e. used abbreviations correctly; f. avoided blanks; used "none," zero, or n/a -- not applicable, where appropriate.		

CHECKLIST FOR PERFORMANCE OBJECTIVE 5 (Continued)

COMPLETE REGISTRATION FORM AND PREPARE A MEDICAL FILE FOR A NEW PATIENT

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
4. Completed medical history record: a. asked questions clearly; b. obtained all pertinent information; c. allowed patient time to think about answers; d. repeated questions or explained points to be sure patient understood questions; e. asked the correct questions to complete each of the following sections: statistical data, family history, past history, personal history, present ailment; f. typed or printed all information neatly and legibly; g. used abbreviations correctly; h. avoided blanks with a zero or "none"; i. rechecked form at end to be sure all information was complete and accurate; and j. noted any additional pertinent information the patient related.		

APPROVED: YES ____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 6

TASK

Explain doctor's fees.

STANDARD OF PERFORMANCE OF TASK

Fee charges must be explained to a patient in a courteous and correct manner.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Fee schedule
Patient with a bill

ENABLING OBJECTIVES

1. Have knowledge of fee schedule.
2. Have good communication skills.

RESOURCES

1. Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies**, pp. 169-74.
2. Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies, Competency-based Student Workbook**, pp. 77-81.

TEACHING ACTIVITIES

1. Assign for reading pages 169-74 in **Medical Assisting: Clinical and Administrative Competencies** and discuss doctor fees.
2. Have student role-play explaining doctor's fees to patients.
3. Invite a person from an insurance company to visit the class and explain how medical claims are paid.
4. Assign student to research current health costs as they relate to doctor fees.
5. Assign student to complete a minimum of three practice assignments. Each practice is to be checked by the other students for correctness.

PERFORMANCE OBJECTIVE 6

CRITERION-REFERENCED MEASURE

Practical Application

Given a fee schedule and a patient with a bill for services rendered, the student will explain fee charges to a patient. Information given to the patient must be without error and done in a courteous manner.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 6

EXPLAIN DOCTOR'S FEES

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	**RATING**	
	Acceptable	**Unacceptable**
1. Determined that the patient had correct bill.		
2. Referred to the fixed schedule of fees for the various services rendered.		
3. If possible, explained medical charge in advance.		
4. Explained itemized billing including its main parts: patient's name, date, type of service rendered, fee.		
5. Displayed professional attitude toward patient that demonstrated patience and a knowledge of fee schedules.		
6. Referred the patient to the doctor if fee explanation was unsatisfactory to the patient.		

APPROVED: YES ____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 7

TASK

File letters, diagnostic reports, and progress notes in patient' s records.

STANDARD OF PERFORMANCE OF TASK

The following items must be correctly filed in the patient's folders according to office procedure: letters, diagnostic reports, progress notes and any related information; each file must be filed correctly in the filing cabinet.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Items to be filed
File cabinets
Patient file folders

ENABLING OBJECTIVES

1. Have knowledge of office filing system.
2. Have general knowledge of filing procedures.

RESOURCES

1. Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies,** pp. 174-81.
2. Simmer. **Diversified Health Occupations,** 2nd edition, pp. 471-74.
3. Simmer. **Workbook for Diversified Health Occupations,** 2nd edition, pp. 425-39.
4. **Webster's Secretarial Handbook**, 2nd edition, pp. 397-422.

TEACHING ACTIVITIES

1. Assign pages 471-74 in **Diversified Health Occupations** for class discussion.
2. Assign pages 174-81 in **Medical Assisting: Clinical and Administrative Competencies** for class discussion.
3. Assign pages 397-422 in **Webster's Secretarial Handbook** for class discussion.
4. Have student complete workbook assignments in **Diversified Health Occupations Workbook**, pages 425-39, for class discussion.
5. Assign student to demonstrate in class the correct filing methods for a variety of offices.
6. Assign student to write a paper on the advantages/disadvantages of numerical/alphabetical filing.

PERFORMANCE OBJECTIVE 7

CRITERION-REFERENCED MEASURE

Practical Application

Given a group of letters, diagnostic reports, progress notes and the necessary supplies, the student will file all the items in the patients' folders according to the established office procedure.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 7

FILE LETTERS, DIAGNOSTIC REPORTS, AND PROGRESS NOTES IN PATIENT'S RECORDS

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Filed a series of 50 names alphabetically, meeting all of the following criteria: a. indexed personal names; b. indexed names of businesses and organizations; c. indexed words such as "of," "and;" d. filed names in alphabetical order; e. filed "nothing" before "something" (Boon, W. before Boon, Will); f. treated prefixes as part of the name; g. used hyphenated names as one unit; h. spelled out known abbreviations such as "Mt"; i. used titles or degrees and notations such as "Jr." as final indexing units; and j. spelled out numbers as letters (3rd as "third").		
2. Filed a series of 50 numbers, meeting the following criteria: a. put numbers in order from small to large; and b. disregarded zeros placed in front of numbers.		

CHECKLIST FOR PERFORMANCE OBJECTIVE 7 (Continued)

FILE LETTERS, DIAGNOSTIC REPORTS, AND PROGRESS NOTES IN PATIENT'S RECORDS

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
3. Filed 50 numbers in a terminal number system (5 terminal digits with 10 numbers in each digit system), meeting the following criteria: a. separated numbers into five terminal digit systems; b. arranged each system in correct numerical order; and c. placed five terminal digit systems in correct numerical order.		

APPROVED: YES ____ NO ____

Evaluator's Signature Date

DUTY PERFORMING GENERAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 8

TASK

Gather data for necessary reports regarding referrals to other doctors.

STANDARD OF PERFORMANCE OF TASK

The data should include the patient's name, address, phone number, previous medical history, conditions for which referral is made and a description of current treatment.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Patient chart
Information regarding referral

ENABLING OBJECTIVES

1. Have knowledge of copy machines.
2. Have knowledge of referral procedures.

RESOURCE

Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies**, pp. 184-85.

TEACHING ACTIVITIES

1. Assign pages 184-85 in **Medical Assisting: Clinical and Administrative Competencies** and discuss the process of referring patients to other doctors.
2. Demonstrate correct procedures to follow when referring a patient.
3. Invite a physician to visit the class and explain the importance of including all pertinent information when referring patients.
4. Assign student to demonstrate, in class, the correct referral of patients.
5. Assign student to complete a minimum of three practice assignments. Each practice is to be checked by other students for correctness.

PERFORMANCE OBJECTIVE 8

CRITERION-REFERENCED MEASURE

Practical Application

Given instructions from the doctor and the necessary supplies and information, the student will gather data on a patient for a referral.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 8

GATHER DATA FOR NECESSARY REPORTS REGARDING REFERRALS TO OTHER DOCTORS

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	**RATING**	
	Acceptable	**Unacceptable**
1. Collected personal information on patient such as name, address and phone number.		
2. Copied patient's previous medical history.		
3. Noted treatment rendered to date and condition for which referral was to be made.		
4. Determined doctor to whom patient was to be referred.		
5. Determined whether the patient wished an appointment made and the date and time preferred.		
6. Contacted the referred physician's office and made the appointment.		
7. Advised the patient of the times and dates available and scheduled the chosen time.		
8. Gave the patient a card with the name of physician, date, time of appointment, and the physician's office address.		

APPROVED: YES _____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 9

TASK

Maintain an appointment reminder system.

STANDARD OF PERFORMANCE OF TASK

Patients to be seen the next day must be contacted by telephone and their appointments confirmed. Each patient on the appointment book page should be called or noted to re call.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Appointment book
Telephone

ENABLING OBJECTIVES

1. Use the telephone properly.
2. Have knowledge of scheduling patients.

RESOURCE

Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies**, pp. 165-66.

TEACHING ACTIVITIES

1. Assign pages 165-66 in **Medical Assisting: Clinical and Administrative Competencies** and discuss the importance of reminding patients of appointments.
2. Review proper scheduling of patients.
3. Demonstrate the correct procedure for reminding patients of their appointments.
4. Assign student to demonstrate in class the correct method of reminding patients of appointments.
5. Assign student to complete a minimum of three practice assignments. Each practice is to be checked by other students for correctness.

PERFORMANCE OBJECTIVE 9

CRITERION-REFERENCED MEASURE

Practical Application

Given an appointment book and a telephone, the student will contact the patients who are to be seen the next day and confirm their appointments as scheduled in the appointment book.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 9 EVALUATION

MAINTAIN AN APPPOINTMENT REMINDER SYSTEM

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Opened appointment book to next day's appointments.		
2. Found each patient's phone number if not noted in appointment book.		
3. Called and reminded each patient of appointment.		
4. Rescheduled patient if appointment could not be kept.		
5. Placed a check beside the names of those reached and a note as a reminder to call those not reached.		

APPROVED: YES _____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 10

TASK

Maintain control system for medical records.

STANDARD OF PERFORMANCE OF TASK

Medical record files must be maintained for one week as established office policy. At end of the one week, all inactive/outdated files and materials should be noted; all files must be neat/orderly. Any files checked out should be noted.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Active record files
Inactive record files
Outdated files
File record

ENABLING OBJECTIVES

1. Have general knowledge of filing (alphabetical and numerical).
2. Have knowledge of physician's office policy.

RESOURCES

1. Keir, Wise and Krebs-Shannon. **Medical Assisting Clinical and Administrative Competencies**, pp. 174-81.
2. Keir, Wise and Krebs-Shannon. **Medical Assisting Clinical and Administrative Competencies, Compentency-based Student Workbook**, pp. 82-87.

TEACHING ACTIVITIES

1. Assign pages 174-81 in **Medical Assisting Clinical and Administrative Competencies** and discuss the importance of records control.
2. Complete assignments in **Medical Assisting Clincal and Administrative Competencies, Compentency-based Student Workbook**, pages 82-87.
3. Demonstrate correct methods of controlling records.
4. Assign student to complete three practice assignments to be checked by other students.
5. Using check sheet, monitor student for correct control of records.

PERFORMANCE OBJECTIVE 10

CRITERION-REFERENCED MEASURE

Practical Application

Given medical record files in a doctor's office, the student will maintain the files per established office policy.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 10

MAINTAIN CONTROL SYSTEM FOR MEDICAL RECORDS

Student's Name Date

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Placed all records in appropriate files daily.		
2. Separated inactive files from active files at scheduled times and placed in the inactive files.		
3. Maintained neat files including: a. put all completed papers in folders; b. placed all folders facing forward; c. kept tabs neat and accurate.		
4. Noted which files had been removed and by whom on checkout list.		

APPROVED: YES ____ NO ____

Evaluator's Signature Date

DUTY PERFORMING GENERAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 11

TASK

Prepare release form and obtain the necessary signatures.

STANDARD OF PERFORMANCE OF TASK

The completed form must contain the patient's name, correct date, signatures and individual/agency to whom the records are to be sent.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Forms
Request for information

ENABLING OBJECTIVES

1. Have general knowledge of legal requirements for release of patient information.
2. Have knowledge of physician's office policy.

RESOURCE

Keir, Wise and Krebs-Shannon. **Medical Assisting Clinical and Administrative Competencies**, pp. 435-44.

TEACHING ACTIVITIES

1. Assign pages 435-44 in **Medical Assisting Clinical and Administrative Competencies** and discuss the importance of getting patient's consent.
2. Invite an attorney to visit the class to discuss legal modifications of patient consent.
3. Discuss various forms used for patient's consent.
4. Assign student to role-play obtaining consents and have him/her use checklist for proper procedure a minimum of three times.
5. Demonstrate correct procedure for obtaining patient consent.

PERFORMANCE OBJECTIVE 11

CRITERION-REFERENCED MEASURE

Practical Application

Given a form and a request by a patient to authorize a release of personal medical information, the student will prepare the release form and obtain all necessary signatures.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 11

PREPARE RELEASE FORM AND OBTAIN THE NECESSARY SIGNATURES

Student's Name **Date**

DIRECTIONS TO STUDENT	Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.
DIRECTIONS TO EVALUATOR	Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	**RATING**	
	Acceptable	**Unacceptable**
1. Filled out the release form including: a. date; b. patient's name; c. agency and/or individual to whom information may be released.		
2. Obtained required signatures including: a. patient; b. doctor and/or agency representative; c. others as required by the situation.		

APPROVED: YES _____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 12

TASK

Process incoming mail.

STANDARD OF PERFORMANCE OF TASK

Incoming mail must be opened and routed correctly. No mail should be returned because of mis-routing.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Unopened mail
Paper clips and letter opener
Rubber date stamp and ink pad

ENABLING OBJECTIVES

1. Have general knowledge of office policy.
2. Have knowledge of doctor's preferences on mail.

RESOURCES

1. Atkinson. **The Medical Assistant**, pp. 184-86.
2. Atkinson. **Medical Assistant Workbook**, pp. 90-93.

TEACHING ACTIVITIES

1. Assign pages 184-86 in **Medical Assistant** and discuss mail handling.
2. Assign students to complete pages 90-93 in **Medical Assistant Workbook**.
3. Demonstrate correct processing of mail.
4. Assign student to complete a minimum of three practice assignments. Each practice is to be checked by other students for correctness.
5. Assign student to demonstrate in class the correct processing of mail.

PERFORMANCE OBJECTIVE 12

CRITERION-REFERENCED MEASURE

Practical Application

Given an assortment of incoming mail the student will open and route the mail. No mail can be returned because of mis-routing.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 12

PROCESS INCOMING MAIL

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	**Unacceptable**
1. Opened mail correctly.		
2. Checked contents for damage.		
3. Attached enclosures and envelopes.		
4. Dated/time-stamped mail.		
5. Sorted and arranged mail.		
6. Distributed mail to designated locations.		

APPROVED: YES _____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 13

TASK

Collate patient medical records for daily appointment schedule.

STANDARD OF PERFORMANCE OF TASK

Patients' records for one day must be collated. Folders for the day's appointments must be arranged in the order of the day's schedule.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

List of scheduled appointments
Patient files

ENABLING OBJECTIVES

1. Have general knowledge of office policy regarding daily records.
2. Have knowledge of filing.

RESOURCE

Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies**, pp. 177-81.

TEACHING ACTIVITIES

1. Assign pages 177-81 in **Medical Assisting: Clinical and Administrative Competencies** and discuss importance of pulling records in advance.
2. Schedule a field trip to a large doctor's office or clinic in advance.
3. Have student complete a minimum of three telephone calls. Each practice is to be checked by other students for correctness.
4. Assign student to demonstrate the correct methods of collating patients' charts for daily appointment schedule.

PERFORMANCE OBJECTIVE 13

CRITERION-REFERENCED MEASURE

Practical Application

Given a list of scheduled appointments for one day, the student will collate the patient records.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 13

COLLATE PATIENT MEDICAL RECORDS FOR DAILY APPOINTMENT SCHEDULE

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Read appointment book.		
2. Identified name of each scheduled patient.		
3. Pulled patient's records from files.		
4. Arranged all records according to each patient's appointment.		
5. Placed record in appropriate examination room.		

APPROVED: YES ____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 14

TASK

Receive patients and visitors.

STANDARD OF PERFORMANCE OF TASK

Patients and visitors must be greeted and received according to established office procedures.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Patients' sign in sheets
Chairs
Patients or visitors

ENABLING OBJECTIVES

1. Have general knowledge of etiquette in greeting people.
2. Have knowledge of office policy regarding signing in patients.

RESOURCES

1. Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies**, p. 168.
2. Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies, Competency-based Student Workbook**, pp. 75-76.

TEACHING ACTIVITIES

1. Assign page 168 in **Medical Assisting: Clinical and Administrative Competencies** and discuss the receptionist's role in greeting patients and visitors.
2. Have students complete assignment on pages 75-76 in **Medical Assisting: Clinical and Administrative Competencies Workbook.**
3. Invite a medical receptionist to the class to talk about the importance of the receptionist's job.
4. Role-play greeting patients and assisting them in the sign in procedure.
5. Assign student to complete a minimum of three practice assignments. Each practice is to be checked by other students for correctness.

PERFORMANCE OBJECTIVE 14

CRITERION-REFERENCED MEASURE

Practical Application

Given class discussion, the student will describe how to greet patients and visitors according to established office procedures.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 14

RECEIVE PATIENTS AND VISITORS

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	**RATING**	
	Acceptable	**Unacceptable**
1. Observed when each patient or visitor arrived.		
2. Acknowledged the person in a pleasant manner.		
3. Determined the person's name and purpose of visit as follows: a. asked patient to sign in (if procedure was used); b. asked patient if there had been a change in either address or insurance coverage; c. if visitor was a salesperson, determined when the doctor's schedule would allow salesperson's call.		
4. Addressed person by name.		
5. Showed person where to put hat, coat, or parcels.		
6. Invited person to be seated and offered reading material.		
7. Informed the person as to length of wait before seeing physician.		

APPROVED: YES ____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 15

TASK

Schedule patient for out-patient diagnostic tests.

STANDARD OF PERFORMANCE OF TASK

Patient must be scheduled for the correct diagnostic test in the facility preferred by the doctor. All necessary information must be recorded.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Blank requisitions from local hospitals and/or laboratories
Telephone
Patient
Supplies for tests if needed

ENABLING OBJECTIVES

1. Have general knowledge of physician, laboratory or hospital policies.
2. Have general knowledge of tests and facilities available.

RESOURCE

Keir, Wise and Krebs-Shannon. **Medical Assistant: Clinical and Administrative Competencies**, pp. 163, 293-372.

TEACHING ACTIVITIES

1. Assign reading in **Medical Assistant: Clinical and Administrative Competencies** and discuss referring patients for diagnostic tests.
2. Invite a guest speaker from a consulting laboratory to present to class on the use of diagnostic tests in treating patients.
3. Assign student to observe in a doctor's office the scheduling of patients for diagnostic tests.
4. Assign student to practice filling out sample requisition slips from local hospitals and/or laboratories.
5. Assign student to complete a minimum of three practice assignments using a checklist. Each practice is to be checked by other students for correctness.

PERFORMANCE OBJECTIVE 15

CRITERION-REFERENCED MEASURE

Practical Application

Given a patient, the necessary information, and supplies and requisitions, the student will schedule the patient for a diagnostic test as indicated by the doctor.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 15

SCHEDULE PATIENT FOR OUT-PATIENT DIAGNOSTIC TESTS

Student's Name Date

DIRECTIONS TO STUDENT	Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.
DIRECTIONS TO EVALUATOR	Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Determined name of patient, type of test to be performed, and facility to be used.		
2. Determined time preferred by patient.		
3. Called facility.		
4. Scheduled test(s).		
5. Gave patient an appointment slip with the following: name of facility, address, phone number, and place to report for test.		
6. Gave patient written instructions concerning preparation for test, including eating, drinking, taking medicine and enemas.		

APPROVED: YES _____ NO ____

Evaluator's Signature Date

DUTY PERFORMING GENERAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 16

TASK

Prepare statements for mailing.

STANDARD OF PERFORMANCE OF TASK

Each statement should have the patient's name, address, service rendered and amount due. Ledger cards, statements and envelope addresses must be the same.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Ledger cards
Statement sheets
Envelopes
Computer (if office does computer billing)

ENABLING OBJECTIVES

1. Know billing procedures.
2. Have knowledge of computer usage.
3. Have knowledge of copier usage.

RESOURCES

1. Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies**, pp. 169-74.
2. Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies, Competency-based Student Workbook**, pp. 77-81.

TEACHING ACTIVITIES

1. Assign pages 169-74 in **Medical Assisting**: **Clinical and Administrative Competencies** and discuss the billing of patients.
2. Assign student to complete assignments on pages 77-81 in **Medical Assisting: Clinical and Administrative Competencies Workbook** .
3. Review basic math computations needed in completing statements.
4. Demonstrate correct billing procedures.
5. Assign student to complete a minimum of three practice assignments. Each practice is to be checked by other students for correctness.

PERFORMANCE OBJECTIVE 16

CRITERION-REFERENCED MEASURE

Practical Application

Given patient ledger cards, statement sheets and envelopes, the student will prepare the statements for mailing.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 16

PREPARE STATEMENTS FOR MAILING

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Prepared statements to include: a. date of statement; b. name and address of person responsible for charges; c. itemized statement of dates, services rendered, and persons for whom services were rendered for the billing period; d. other unpaid charges carried over (may or may not have been itemized depending on office procedures); and e. date payment was due.		
2. Prepared envelope with full name of person responsible and with address including zip code.		

APPROVED: YES _____ NO ____

Evaluator's Signature **Date**

PERFORMING GENERAL OFFICE MANAGEMENT FUNCTIONS

DUTY PERFORMING GENERAL OFFICE MANAGEMENT FUNCTIONS

PERFORMANCE OBJECTIVE 17

TASK

Arrange for maintenance and repair of equipment.

STANDARD OF PERFORMANCE OF TASK

Equipment used in a doctor's office must be maintained and repaired when needed. Maintenance and equipment contracts must be reviewed and service called for as needed. Repair service must be called for equipment not under service contract.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Service contracts
List of repair and maintenance shops with telephone numbers
Broken equipment and/or equipment in need of maintenance

ENABLING OBJECTIVES

1. Have general knowledge of service contracts.
2. Have general knowledge of equipment maintenance.

RESOURCE

Freuhling and Weaver. **Electronic Office Procedures**, pp. 489-91.

TEACHING ACTIVITIES

1. Present a sample of service contracts and discuss the features of each.
2. Arrange for a guest speaker to review basic office equipment maintenance.
3. Assign student to make a schedule for routine equipment maintenance in a doctor's office.
4. Assign student to complete a minimum of three practice assignments. Each practice is to be checked by other students for correctness.
5. Assign student to demonstrate correct procedure for arranging for maintenance and repair of equipment.

PERFORMANCE OBJECTIVE 17

CRITERION-REFERENCED MEASURE

Practical Application

Given equipment service contracts and a list of other repair and maintenance shops, the student will arrange for maintenance and/or repair of equipment in a doctor's office.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 17

ARRANGE FOR MAINTENANCE AND REPAIR OF EQUIPMENT

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Reviewed current service contracts on a scheduled basis.		
2. Called agents to remind them if service was due.		
3. Examined equipment not covered by service contracts.		
4. Called repair service for any equipment which needed repair, routine service, or maintenance.		

APPROVED: YES _____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL OFFICE MANAGEMENT FUNCTIONS

PERFORMANCE OBJECTIVE 18

TASK

Complete daily record sheet.

STANDARD OF PERFORMANCE OF TASK

The daily record sheet must be completed for one day . All charges, cash, and accounts must be itemized and totaled without error. Notations for each type of service should be made on the daily record sheet for each patient.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Daily record sheets
List of daily activities
Calculator/adding machine

ENABLING OBJECTIVES

1. Have general knowledge of office policies.
2. Be able to print or write clearly.
3. Use calculator accurately.

RESOURCES

1. Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies**, pp. 213-15.
2. Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies, Competency-based Student Workbook**, pp. 105-108.

TEACHING ACTIVITIES

1. Assign pages 213-15 in **Medical Assistant: Clinical and Administrative Competencies** and discuss importance of the daily log or record sheet.
2. Have student complete assignments on pages 105-08 in **Medical Assisting: Clinical and Administrative Competencies Workbook**.
3. Visit a doctor's office to observe use of the daily record.
4. Assign student to write a short essay on "What would happen without a daily log in a medical office?"
5. Assign student to complete a minimum of three practice assignments. Each practice is to be checked by other students for correctness.

PERFORMANCE OBJECTIVE 18

CRITERION-REFERENCED MEASURE

Practical Application

Given a daily record list and the necessary equipment and supplies, the student will complete the daily record sheet for one day.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 18

COMPLETE DAILY RECORD SHEET

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Noted hours of appointment.		
2. Noted names of patients.		
3. Noted service rendered was posted after the examination.		
4. Noted changes to record sheet.		
5. Noted whether cash/check was received.		
6. Noted payment received on account.		
7. Totaled all columns.		

APPROVED: YES _____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL OFFICE MANAGEMENT FUNCTIONS

PERFORMANCE OBJECTIVE 19

TASK

Update the outside agency file.

STANDARD OF PERFORMANCE OF TASK

All agencies listed must be functioning and all addresses and phone numbers correct.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

File of outside agencies
List of new agencies
List of old agencies

ENABLING OBJECTIVES

1. Have general knowledge of filing.
2. Have knowledge of kinds of agencies found in an outside agency file.

RESOURCE

Fruehling and Weaver. **Electronic Office Procedures**, pp. 231-42.

TEACHING ACTIVITIES

1. Review information included in an outside agency file.
2. Assign student to practice updating an agency file.
3. Assign student to check other students' updated files for correctness.
4. Assign student to demonstrate in class how to update agency files correctly.

PERFORMANCE OBJECTIVE 19

CRITERION-REFERENCED MEASURE

Practical Application

Given a file of outside agencies, the student will demonstrate how to update the file.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 19

UPDATE THE OUTSIDE AGENCY FILE

Student's Name Date

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Obtained a list of new agencies not currently in the file and added these to file.		
2. Examined the current file for agencies no longer referred to and deleted these agencies.		
3. Checked all entries for changes in address and phone number.		
4. Included in file: a. medical supply houses; b. dentists; c. clinics; d. government agencies; e. funeral homes; f. nursing homes; g. laboratories; h. pharmacies; i. social workers; j. surgical supplies; k. welfare agencies; l. poison control centers; m. others as needed.		

APPROVED: YES _____ NO _____

Evaluator's Signature Date

DUTY PERFORMING GENERAL OFFICE MANAGEMENT FUNCTIONS

PERFORMANCE OBJECTIVE 20

TASK

Update inventory list of office supplies and equipment.

STANDARD OF PERFORMANCE OF TASK

The inventory list must reflect an accurate count of all supplies and equipment.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Blank requisition form
Outside agency file
Office inventory

ENABLING OBJECTIVES

1. Have general knowledge of needed equipment and supplies.
2. Have general knowledge of requisitions and how to order supplies and equipment.

RESOURCE

Fruehling and Weaver. **Electronic Office Procedures**, pp. 489-91.

TEACHING ACTIVITIES

1. Discuss need for maintaining an inventory and ordering needed items.
2. Assign student to inventory classroom and make a list of needed supplies.
3. Assign student to complete requisitions for six items including all pertinent information.
4. Assign student to check other student's inventory and requisitions for correctness.
5. Assign student to research problems that arise when an inventory is not updated.

PERFORMANCE OBJECTIVE 20

CRITERION-REFERENCED MEASURE

Practical Application

Given class discussion, the student will describe how an inventory list of office supplies and equipment must be updated.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 20

UPDATE INVENTORY LIST OF OFFICE SUPPLIES AND EQUIPMENT

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	**RATING**	
	Acceptable	**Unacceptable**
1. For supply inventory and expendable items: a. determined office procedure regarding frequency of taking supply inventory; b. checked the list of all expendable supply items by sections: business office, lab, clinical; c. determined amount of supplies needed (used) during time between inventories; d. noted items which needed to be replenished.		
2. For equipment inventory and non-expendable items: a. determined office procedure regarding frequency of inventory; b. listed all non-expendable equipment by sections; c. noted date of purchase, approximate cost, vendor, and condition of equipment.		

APPROVED: YES ____ NO ____

Evaluator's Signature Date

DUTY PERFORMING GENERAL OFFICE MANAGEMENT FUNCTIONS

PERFORMANCE OBJECTIVE 21

TASK

Prepare purchase requisition.

STANDARD OF PERFORMANCE OF TASK

A purchase order must be prepared to include the following items: description, quantity desired, correct cost, total of order, and method of shipping appropriate for order.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

List of supplies to order
Requisition form

ENABLING OBJECTIVES

1. Have good written communication skills.
2. Have good computational skills.

RESOURCE

Baron, Steinfeld and Schulteis. **Record Keeping in the Computer Age**, 6th edition, pp. 370-72.

TEACHING ACTIVITIES

1. Describe the reasons for using purchase orders/requisitions.
2. Assemble several examples of purchase orders to show student.
3. Discuss and demonstrate how to complete a sample purchase order form.

PERFORMANCE OBJECTIVE 21

CRITERION-REFERENCED MEASURE

Practical Application

Given class discussion, the student will demonstrate how to prepare a purchase requisition.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 21

PREPARE PURCHASE REQUISITION

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Identified items to be ordered.		
2. Determined company doctor prefers.		
3. Checked supply catalog for description of items, cost, and quantity.		
4. Prepared purchase order in duplicate with: a. date and address; b. name of each item and description; c. quantity desired; d. cost of item; e. total amount of order; and f. type of shipping.		
5. Reviewed purchase order preferences with physician before ordering.		

APPROVED: YES ____ NO ____

Evaluator's Signature **Date**

PERFORMING GENERAL ACCOUNTING PROCEDURES

DUTY PERFORMING GENERAL ACCOUNTING PROCEDURES

PERFORMANCE OBJECTIVE 22

TASK

Collect delinquent bills.

STANDARD OF PERFORMANCE OF TASK

Initial proceedings must be started to collect ten overdue accounts. Procedures used must be appropriate for age and status of each account based on the predetermined collection policy.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Overdue accounts
Written office policy on delinquent accounts
Statement forms and other reminder items
Telephone and telephone directory

ENABLING OBJECTIVES

1. Have typing and filing ability.
2. Have knowledge of telephone etiquette.

RESOURCE

Aurandt. **The Professional Medical Secretary**, pp. 249-64.

TEACHING ACTIVITIES

1. Discuss and describe the usual policies regarding delinquent bill collection.
2. Arrange field trips to hospital business offices.
3. Provide clinical rotation with observation of a medical secretary.

PERFORMANCE OBJECTIVE 22

CRITERION-REFERENCED MEASURE

Practical Application

Given classroom discussion and demonstration, the student will demonstrate the procedures needed to collect ten overdue accounts.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 22

COLLECT DELINQUENT BILLS

Student's Name Date

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Determined office collection procedure for overdue accounts.		
2. Determined ages of accounts and previous attempts to collect. Followed up on bills three months or older.		
3. Followed up with these measures: a. first reminder should be a simple reminder ("Payment of this bill is overdue."): b. if first reminder does not elicit response, a letter should be sent to patient; c. telephone calls may be a means of follow-up.		
4. Determined from doctor if and when account should be turned over to collection agency.		

APPROVED: YES _____ NO ____

Evaluator's Signature Date

DUTY PERFORMING GENERAL ACCOUNTING PROCEDURES

PERFORMANCE OBJECTIVE 23

TASK

Collect and post payments.

STANDARD OF PERFORMANCE OF TASK

Payments of patients wishing to pay immediately must be collected and posted. At the end of the day the patients' ledger sheets must include an itemized account of services rendered and the amount owed and paid. This must be completed without error.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Pegboard base
Day sheet and ledger cards
Statement receipt forms
Office supplies

ENABLING OBJECTIVES

1. Use pegboard system of payments.
2. Interpret and transfer doctor notations on records.

RESOURCES

1. Simmer. **Diversified Health Occupations**, 2nd edition, pp. 409-14.
2. Aurandt. **The Professional Medical Secretary**, pp. 208-26.

TEACHING ACTIVITIES

1. Utilize text material and resources to instruct student in the use of the ledger cards and appropriate terminology.
2. Simulate an office situation that involves the various bookkeeping systems, including the use of computers.
3. Visit an actual office setting and observe their system of collecting and posting payments.

PERFORMANCE OBJECTIVE 23

CRITERION-REFERENCED MEASURE

Practical Application

Given class discussion, the student shall demonstrate knowledge of basic office procedures regarding the collection and posting of payments.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 23

COLLECT AND POST PAYMENTS

Student's Name **Date**

DIRECTIONS TO STUDENT	Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.
DIRECTIONS TO EVALUATOR	Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Recorded all of the following information on ledger cards correctly: a. patients' names/addresses; b. descriptions of services; and c. payments, charges and current balances.		
2. Recorded all of the following information on the statement-receipt forms: a. patients' names and dates; b. descriptions of services; c. charges, payments made, and current balances; and d. next appointment date/time.		
3. Recorded all of the following information on the day sheet: a. date and names of patients; b. descriptions of services; c. correct previous balances from current balances on ledger cards; d. charges, payments made or received, and current balances.		

CHECKLIST FOR PERFORMANCE OBJECTIVE 23 (Continued)

COLLECT AND POST PAYMENTS

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
3. (Continued) e. receipt numbers from statement-receipt forms; f. figures in cash column; g. figures in check column; h. final figures in proof of posting boxes; i. final totals for deposit slip.		

APPROVED: YES _____ NO ____

Evaluator's Signature Date

DUTY PERFORMING GENERAL ACCOUNTING PROCEDURES

PERFORMANCE OBJECTIVE 24

TASK

Maintain a file of unpaid accounts.

STANDARD OF PERFORMANCE OF TASK

The accounts receivable file must be maintained for one day in the physician's office. At the close of the day, new accounts receivable files must be filed in order, payments posted on the patient ledger cards, and accounts paid in full removed from the file.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Accounts receivable file
Ledger cards
Filing system
Office supplies

ENABLING OBJECTIVES

1. Understand basic billing procedures.
2. Understand office procedures related to unpaid accounts.

RESOURCES

1. Simmer. **Diversified Health Occupations**, 2nd edition, pp. 409-14.
2. Aurandt. **The Professional Medical Secretary**, pp. 250-64.

TEACHING ACTIVITIES

1. Describe general policies regarding the procedures discussed in the text and the variation in procedures that may occur from setting to setting.
2. Demonstrate telephone courtesy in the collection of unpaid accounts as well as face to face activities.

PERFORMANCE OBJECTIVE 24

CRITERION-REFERENCED MEASURE

Practical Application

Given classroom discussion and demonstration, the student will simulate maintaining unpaid accounts.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 24

MAINTAIN A FILE OF UNPAID ACCOUNTS

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Collected daily charge sheets.		
2. Posted new charges on ledger cards in accounts receivable file. Added charges to balance due.		
3. Pulled ledger cards of patients whose cards were in accounts paid file. Posted charges due and filed cards in accounts receivable file.		
4. Made new ledger cards for new patients; posted charges and filed cards according to system.		
5. Posted all payments received. Filed paid-in-full ledger cards in accounts paid file. Placed ledger cards not paid in full back in the accounts receivable file.		

APPROVED: YES _____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL ACCOUNTING PROCEDURES

PERFORMANCE OBJECTIVE 25

TASK

Maintain petty cash fund.

STANDARD OF PERFORMANCE OF TASK

The petty cash fund must be balanced and maintained for one week. At the end of the week, all transactions must be recorded in the expense book and the book balanced.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Cash on hand ($50 or less)
Simple ledger for record keeping
Voucher/check for replenishing petty cash as needed

ENABLING OBJECTIVE

Understand basic accounting procedures.

RESOURCE

Aurandt. **The Professional Medical Secretary,** pp. 244-45.

TEACHING ACTIVITIES

1. Describe the processes of maintaining a petty cash fund, record keeping and check writing.
2. Student will demonstrate the common problems of petty cash funds.

PERFORMANCE OBJECTIVE 25

CRITERION-REFERENCED MEASURE

Practical Application

Given class discussion and demonstration, the student will demonstrate how to balance and maintain the petty cash fund.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 25

MAINTAIN PETTY CASH FUND

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Recorded the beginning balance.		
2. Prepared petty cash voucher for each amount withdrawn.		
3. Recorded vouchers in expense book.		
4. Wrote checks to replenish fund as necessary.		
5. Recorded cash amount added.		
6. Balanced expense book at the end of time period.		

APPROVED: YES _____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL ACCOUNTING PROCEDURES

PERFORMANCE OBJECTIVE 26

TASK

Prepare bank deposit slips.

STANDARD OF PERFORMANCE OF TASK

A deposit slip must be prepared in duplicate. When completed, all checks must be endorsed and listed on the deposit slip. All coins, currency, and checks must be totaled without error.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Blank deposit slips
Checks and currency
Office supplies

ENABLING OBJECTIVES

1. Have knowledge of basic accounting practices.
2. Have knowledge of basic banking procedures.

RESOURCE

Simmer. **Diversified Health Occupations**, 2nd edition, pp. 417-18.

TEACHING ACTIVITIES

1. Assign pages 417-18 for reading in **Diversified Health Occupations** for class discussion.
2. Describe the routine problems/procedures needed to make bank deposits.
3. Provide practice through simulation.

PERFORMANCE OBJECTIVE 26

CRITERION-REFERENCED MEASURE

Practical Application

Given class discussion and demonstration, the student will demonstrate how to prepare bank deposit slips.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 26

PREPARE BANK DEPOSIT SLIPS

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	**RATING**	
	Acceptable	**Unacceptable**
1. Listed the name of the depositor and, if necessary, the account number on the deposit slip.		
2. Processed checks in the following manner: a. counted number of checks; b. endorsed checks; and c. recorded the amount of each check on the deposit slip.		
3. Counted paper currency and noted amount.		
4. Counted coins and noted amount.		
5. Added total amount of currency.		
6. Recorded amount of currency on bank deposit slip.		
7. Totaled amount of checks and currency and recorded on deposit slip.		
8. Placed checks, currency and deposit slip into container for transportation to bank.		
9. Kept one copy of deposit slip for office records.		

APPROVED: YES _____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL ACCOUNTING PROCEDURES

PERFORMANCE OBJECTIVE 27

TASK

Process charge slips.

STANDARD OF PERFORMANCE OF TASK

Charge slips for one day must be processed. At the end of the day each patient seen must have a charge slip indicating patient's name and address, the date, services rendered, charges incurred, and amount paid. These items must be verified by patient charts.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Charge slips and pen
Patient information

ENABLING OBJECTIVES

1. Write legibly.
2. Know general office procedures.

RESOURCE

Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies**, chapter 6.

TEACHING ACTIVITIES

1. Demonstrate the proper techniques for posting charges and services encountered during the office visit and show typical charge slips.
2. Discuss and explain common problems encountered in posting charges.
3. Provide practice through simulation.

PERFORMANCE OBJECTIVE 27

CRITERION-REFERENCED MEASURE

Practical Application

Given class discussion and demonstration, the student will process charge slips.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 27

PROCESS CHARGE SLIPS

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Filled out a charge slip for each patient, entering the patient's name and address and the date.		
2. Clipped the charge slip to the patient's medical history file, or handed the slip to the patient, instructing him/her to give it to the doctor. Note: Be sure to verify that the patient and the medical history file are the same.		
3. Obtained the charge slip from the patient or the file after the patient had seen the doctor.		
4. Verified the services which the doctor indicated on the charge slip with the services indicated on the patient's chart.		
5. Recorded the amount due if the doctor did not do this.		
6. Recorded the amount received on the charge slip.		

APPROVED: YES _____ NO _____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL ACCOUNTING PROCEDURES

PERFORMANCE OBJECTIVE 28

TASK

Prepare checks for doctor's signature.

STANDARD OF PERFORMANCE OF TASK

Ten checks for ten accounts must be prepared. Each check and stub must be completed without error, legibly written and ready for the doctor's signature.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Sample bank checks and pen
Assigned bills to be paid by check

ENABLING OBJECTIVES

1. Write legibly.
2. Understand check-writing procedures.

RESOURCE

Simmer. **Diversified Health Occupations, 2nd** edition, pp. 416-17.

TEACHING ACTIVITIES

1. Demonstrate proper method of writing checks and balancing bank books/statements.
2. Review general bank practices relating to checks.

PERFORMANCE OBJECTIVE 28

CRITERION-REFERENCED MEASURE

Practical Application

Given class discussion and demonstration, the student will prepare checks for a doctor's signature.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 28

PREPARE CHECKS FOR DOCTOR'S SIGNATURE

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Filled in the stub with: a. date; b. name; c. purpose of payment; and d. balance of account.		
2. Prepared the check by: a. writing date and number of the check; b. writing the name of the payee in full; c. writing the amount in decimals after the printed $ sign; d. writing the amount in words, writing "and" in place of decimal, and writing the cents amount as a fraction; e. giving the check to the doctor to sign.		

APPROVED: YES _____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL ACCOUNTING PROCEDURES

PERFORMANCE OBJECTIVE 29

TASK

Reconcile bank statements, cash count and receipts.

STANDARD OF PERFORMANCE OF TASK

The bank statement must be reconciled with the office checkbook on a monthly basis. Daily receipts must be reconciled with the amount of cash and checks received. Upon completion, bank statement should agree with checkbook balance and daily receipts should equal cash plus check totals.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Office checkbook
Bank statement
Daily cash receipts
Checks and cash for a day's receipts
Calculator
Office forms

ENABLING OBJECTIVES

1. Use calculator.
2. Count money accurately.
3. Understand and interpret bank statements.
4. Use standard accounting forms correctly.

RESOURCE

Aurandt. The Professional Medical Secretary, pp. 238-42.

TEACHING ACTIVITIES

1. Provide lecture/discussion on the following:
    a. correct addition and subtraction used to calculate the balance of a checkbook.
    b. list outstanding checks.
    c. make service charge and subtract.
    d. compare bank deposits with the statements.
    e. total cash and checks received.
    f. total receipts and compare with checks and cash.
2. Invite an office (medical) secretary to the class to discuss basic procedures and problems related to office accounting.
3. Demonstrate reconciling bank statements, cash count and receipts.

PERFORMANCE OBJECTIVE 29

CRITERION-REFERENCED MEASURE

Practical Application

The student will satisfactorily demonstrate the technique of balancing a bank account against the bank statement and accurately totaling cash, checks and receipts for comparison.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 29

RECONCILE BANK STATEMENTS, CASH COUNT AND RECEIPTS

Student's Name Date

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Compared the cancelled checks with the items on the statement.		
2. Noted the service charges.		
3. Arranged the cancelled checks in numerical order and compared with the checkbook stubs.		
4. Placed a "✓" on each stub for which a cancelled check had been returned.		
5. Totaled the outstanding checks and subtracted from the bank statement balance.		
6. Compared the bank deposits with the statement.		
7. Noted the deposits in transit (deposited but not on the statement).		
8. Added any deposits made but not itemized on the bank statement to the balance obtained from step 6.		
9. Subtracted the outstanding checks from this adjusted amount.		

CHECKLIST FOR PERFORMANCE OBJECTIVE 29 (Continued)

RECONCILE BANK STATEMENTS, CASH COUNT AND RECEIPTS

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
10. Subtracted any service charges from the bank book balance.		
11. If bank book and statement didn't agree, repeated the process.		
12. Totaled cash and checks received.		
13. Totaled amount of receipts.		
14. Compared the two totals.		
15. If totals were not the same, repeated the process until correct or until the cause for any discrepancy had been determined.		

APPROVED: YES _____ NO ____

Evaluator's Signature Date

DUTY PERFORMING GENERAL ACCOUNTING PROCEDURES

PERFORMANCE OBJECTIVE 30

TASK

Review invoices for validity and accuracy.

STANDARD OF PERFORMANCE OF TASK

A shipment of supplies and its billing must be reviewed for correctness. Discrepancies and back orders must be noted and consistent with those found by the instructor.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Purchase order
Invoice
Shipment of supplies

ENABLING OBJECTIVES

1. Be able to work with numbers and accounting forms.
2. Be able to inspect and interpret condition of supplies.

RESOURCE

Swanson. **Accounting,** 3rd edition, pp. 134-36.

TEACHING ACTIVITIES

1. Describe the process of ordering supplies in a medical office.
2. Discuss the normal problems that occur in receiving supplies and the procedures used to handle discrepancies and back orders.

PERFORMANCE OBJECTIVE 30

CRITERION-REFERENCED MEASURE

Practical Application

Given class discussion, the student will describe the normal procedure used to order supplies in a medical office.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 30

REVIEW INVOICES FOR VALIDITY AND ACCURACY

Student's Name **Date**

DIRECTIONS TO STUDENT — Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR — Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	**Unacceptable**
1. Checked all items in shipment with items listed on invoice.		
2. Compared invoice with purchase orders.		
3. Made note of discrepancies and back orders.		

APPROVED: YES ____ NO ____

Evaluator's Signature **Date**

COMPLETING GOVERNMENT FORMS, INSURANCE AND OTHER FINANCIAL REPORTS

DUTY COMPLETING GOVERNMENT FORMS, INSURANCE AND OTHER FINANCIAL REPORTS

PERFORMANCE OBJECTIVE 31

TASK

Complete insurance, medicare, medicaid and reimbursement insurance forms.

STANDARD OF PERFORMANCE OF TASK

Basic insurance forms must be completed accurately and efficiently. Forms should include information regarding medicare, worker compensation, and medicaid.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Typewriter with good ribbon
Correction tape or fluid
Patient ledger card and medical history file
Appropriate forms
Government or company guidelines for completing forms

ENABLING OBJECTIVE

Interpret insurance forms accurately.

RESOURCES

1. Simmer. **Diversified Health Occupations**, 2nd edition, pp. 406-09.
2. Aurandt. **The Professional Medical Secretary**, pp. 265-93.

TEACHING ACTIVITIES

1. Present lecture on basic insurance and medical terminology.
2. Provide guidelines from various agencies.
3. Discuss time factors regarding submission of bills to appropriate agency.
4. Stress accuracy of patient information.
5. Stress honesty regarding patient and insurance company reimbursement.

PERFORMANCE OBJECTIVE 31

CRITERION-REFERENCED MEASURE

Practical Application

Given the various forms, the student will satisfactorily complete the required data using the guidelines provided by the instructor.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 31

COMPLETE INSURANCE, MEDICARE, MEDICAID AND REIMBURSEMENT INSURANCE FORMS

Student's Name Date

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Identified the various types of insurance policies used in the office (Blue Cross, Civilian Health and Medical Program of the Uniformed Services, Medicare/Medicaid).		
2. Secured the patient's signature on a release form so that information could be provided to the insurance company.		
3. Included on the form the following information: a. patient's certificate number; b. the patient's name exactly as on his insurance card; c. group number, if applicable; and d. exact dates of treatment.		
4. Included physician's assigned code.		
5. Obtained physician's signature on form.		
6. Entered amount paid by patient, if any, and amount of unpaid balance.		
7. Put date of claim filing on patient's ledger card.		
8. Mailed original to designated office.		
9. Filed copy in patient's file.		

APPROVED: YES _____ NO ____

Evaluator's Signature Date

DUTY COMPLETING GOVERNMENT FORMS, INSURANCE AND OTHER FINANCIAL REPORTS

PERFORMANCE OBJECTIVE 32

TASK

Complete worker compensation forms.

STANDARD OF PERFORMANCE OF TASK

All required information must appear on the forms without error as compared with the input on the patient's ledger cards.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Worker compensation forms
Patient information

ENABLING OBJECTIVE

Have good writing skills.

RESOURCE

Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies**, pp 200-201.

TEACHING ACTIVITIES

1. Describe the general coverage of the state's worker compensation plan.
2. Discuss the process used to complete worker compensation forms.
3. Invite an insurance claims representative to the class to discuss specific problems involved in this insurance program.

PERFORMANCE OBJECTIVE 32

CRITERION-REFERENCED MEASURE

Practical Application

Given class discussion, the student will describe the purpose of worker compensation plans and how to complete worker compensation forms.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 32

COMPLETE WORKER COMPENSATION FORMS

Student's Name **Date**

DIRECTIONS TO STUDENT	Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.
DIRECTIONS TO EVALUATOR	Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Determined state regulations concerning worker compensation.		
2. Completed worker compensation forms in quadruplicate using patient's medical file, with one copy each for worker's employer, insurance carrier, state worker compensation agency, and office file.		
3. Obtained physician's signature on form.		
4. Mailed form.		
5. Updated the patient's ledger card as each subsequent claim was filed and paid.		

APPROVED: YES ____ NO ____

Evaluator's Signature **Date**

PERFORMING GENERAL LABORATORY PROCEDURES

DUTY PERFORMING GENERAL LABORATORY PROCEDURES

PERFORMANCE OBJECTIVE 33

TASK

Assist with collection of clean-catch or sterile urine specimen.

STANDARD OF PERFORMANCE OF TASK

All items ordered by the doctor for this procedure must be accounted for.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Procedure manual

ENABLING OBJECTIVE

Have specific knowledge of specimen collection process.

RESOURCE

Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies**, pp. 323-31.

TEACHING ACTIVITIES

1. Use the procedure manual to instruct the medical assistant student as to how a clean-catch specimen is collected.
2. Go over the procedure with the student with specific explanations.
3. Demonstrate the procedure to student.
4. Allow the student to verbally explain and demonstrate the procedure to the supervisor or instructor.
5. Discuss with class routine problems in locating all necessary supplies needed for clean-catch or catheterized urine specimens.

PERFORMANCE OBJECTIVE 33

CRITERION-REFERENCED MEASURE

Practical Application

Given classroom discussion and demonstration, the student will provide assistance with the collection of a clean-catch or sterile urine specimen.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 33

ASSIST WITH COLLECTION OF CLEAN-CATCH OR STERILE URINE SPECIMEN

Student's Name **Date**

DIRECTIONS TO STUDENT	Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.
DIRECTIONS TO EVALUATOR	Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. For clean-catch specimen, the student: a. instructed patient to wash hands with the appropriate cleansing equipment and solution; b. instructed the patient in collecting the specimen to void the first small amount into the toilet and collect the indicated amount of urine into the container, then returned container without touching the lip or inside of the container; c. replaced the top without contaminating the specimen; and d. labeled the specimen with patient's name, identification number, test requested, date and time specimen was collected, and type of specimen.		

CHECKLIST FOR PERFORMANCE OBJECTIVE 33 (Continued)

ASSIST WITH COLLECTION OF CLEAN-CATCH OR STERILE URINE SPECIMEN

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
2. For sterile specimen, the student: a. assembled supplies and equipment; b. explained procedure to patient; c. positioned and draped patient; d. informed physician or nurse that patient was prepared for procedure; and e. when the specimen had been completed, labeled it with patient's name, identification number, test requested, date and time specimen was collected, and type of specimen.		

APPROVED: YES _____ NO ____

Evaluator's Signature Date

DUTY PERFORMING GENERAL LABORATORY PROCEDURES

PERFORMANCE OBJECTIVE 34

TASK

Assist with the collection of microorganism smear.

STANDARD OF PERFORMANCE OF TASK

All items specified by the physician for the procedure must be accounted for.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Physician's order
Sterile carbon applicator swabs
Culture medium
Sterile test tube with medium
Lab requisition and label
Pen or pencil for marking
Disposable gloves for nursing staff assisting patient

ENABLING OBJECTIVES

1. Have knowledge of steps specific to smear collection from the throat, vagina, ears, eyes or wounds.
2. Have knowledge of techniques to prevent contamination of smear.
3. Know proper labeling and delivery of specimens to lab.

RESOURCE

Simmers. **Diversified Health Occupations**, 2nd edition, pp. 217-24.

TEACHING ACTIVITIES

1. Incorporate specific explanations in the instruction.
2. Demonstrate the procedure to student.
3. Allow student to verbally explain and demonstrate the procedure to the instructor.
4. Encourage student to ask questions.
5. Provide instruction and hands-on experience given in actual lab setting at available facility.
6. Assist student in locating all necessary supplies needed to collect the specimens.

PERFORMANCE OBJECTIVE 34

CRITERION-REFERENCED MEASURE

Practical Application

Given instruction and lab experience the student will assist with the collection of smears and the proper transfer of such smears to the indicated slide or agar.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 34

ASSIST WITH THE COLLECTION OF MICROORGANISM SMEAR

Student's Name ____________________ Date ____________

DIRECTIONS TO STUDENT — Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR — Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Prepared the patient.		
2. Assembled the necessary supplies.		
3. Passed indicated supplies to the physician.		
4. Spread the material on the slide.		
5. Sprayed with a fixative.		
6. Labeled the specimen.		

APPROVED: YES _____ NO _____

Evaluator's Signature ____________________ Date ____________

DUTY PERFORMING GENERAL LABORATORY PROCEDURES

PERFORMANCE OBJECTIVE 35

TASK

Assist with the collection of a Pap smear.

STANDARD OF PERFORMANCE OF TASK

All equipment requested for the procedure by the physician must be accounted for.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Ayer blades
Cotton tipped applicators
Physician's order
Culture tubes, slides and fixative
Patient gown
Sheet/drape
Sterile cotton type applicators
Gloves
Basin lined with paper towels, tissues
Label and lab requisition
Bath towel/drape towel
Lubricant
Uterine dressing forceps
Vaginal speculum
Tray covered with towel
Cotton balls
Flashlight/examining light

ENABLING OBJECTIVES

1. Have knowledge of proper draping and positioning of patient.
2. Have ability to collect data regarding gynecological history.

RESOURCE

Simmers. **Diversified Health Occupations**, 2nd edition, pp. 271-72.

TEACHING ACTIVITIES

1. Discuss with the class the proper technique of positioning/drapery and assisting the physician with the ayer blade, slide, and fixation process.
2. Discuss with the class some of the problems encountered in the collection of a Pap smear.
3. Incorporate specific explanations in the instruction.
4. Demonstrate procedure to student.

PERFORMANCE OBJECTIVE 35

TEACHING ACTIVITIES (Continued)

5. Allow student to verbally explain and demonstrate the procedures to the instructor.
6. Assist student in assembling the proper equipment and supplies needed to collect the Pap smear. Allow time for hands-on practice to familiarize student with items such as the speculum, sterile applicators and ayer blades.

CRITERION-REFERENCED MEASURE

Practical Application

Given class demonstration, the student will assist with the collection of the vaginal smear and assure efficiency and minimum embarrassment to the patient.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 35

ASSIST WITH THE COLLECTION OF A PAP SMEAR

Student's Name **Date**

DIRECTIONS TO STUDENT: Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR: Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Assembled the necessary supplies and equipment.		
2. Instructed the patient.		
3. Labeled the slides.		
4. Positioned and draped the patient.		
5. Informed the doctor that the patient was prepared.		
6. Passed the doctor the instruments and supplies as needed.		
7. Sprayed with a fixative.		
8. Placed specimens in specific jars or mailing containers.		
9. Filled out the laboratory requisition slip.		
10. Sent the material to the laboratory.		

APPROVED: YES ____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL LABORATORY PROCEDURES

PERFORMANCE OBJECTIVE 36

TASK

Assist with the collection of a randomly voided urine specimen.

STANDARD OF PERFORMANCE OF TASK

The specimen must be collected in a clean container; labeled with donor's name, the date, and type of specimen; and must be at least 5cc in volume.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Physician's order
Disposable gloves for nursing staff assisting patient
Bed pan or urinal
Specimen container
Lab requisition

ENABLING OBJECTIVE

Have specific knowledge of specimen collection.

RESOURCE

Simmer. **Diversified Health Occupations**, 2nd edition, pp. 341-42.

TEACHING ACTIVITIES

1. Describe the proper technique of random urine specimen collection.
2. Discuss possible problems that can occur in the collection process.
3. Assign student to practice this procedure.

PERFORMANCE OBJECTIVE 36

CRITERION-REFERENCED MEASURE

Practical Application

The student will obtain a non-contaminated urine specimen for routine urinalysis.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 36

ASSIST WITH THE COLLECTION OF A RANDOMLY VOIDED URINE SPECIMEN

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Instructed the patient.		
2. Directed the patient to the bathroom.		
3. Gave the patient a suitable container.		
4. Labeled the collected specimen as follows: a. name; b. identification number when designated; c. date and time of collection; d. type of specimen; and e. test requested.		
5. Completed requisition slip.		
6. Took the specimen to the laboratory.		

APPROVED: YES ____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL LABORATORY PROCEDURES

PERFORMANCE OBJECTIVE 37

TASK

Assess and record color, gross appearance, and odor of urine sample.

STANDARD OF PERFORMANCE OF TASK

Five urine specimens must be assessed; the color, gross appearance and odor of each must be recorded.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Disposable gloves
Specimen container, appropriate receptacle

ENABLING OBJECTIVE

Have adequate knowledge and use of observation techniques to distinguish abnormalities.

RESOURCE

Simmer. **Diversified Health Occupations,** 2nd edition, p. 245.

TEACHING ACTIVITY

Use the text material and demonstrate the proper technique for observation of urine characteristics.

PERFORMANCE OBJECTIVE 37

CRITERION-REFERENCED MEASURE

Practical Application

The student will assess the urine for abnormal characteristics.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 37

ASSESS AND RECORD COLOR, GROSS APPEARANCE, AND ODOR OF URINE SAMPLE

Student's Name Date

DIRECTIONS TO STUDENT	Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.
DIRECTIONS TO EVALUATOR	Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Observed the color: normal or abnormal.		
2. Noted the gross appearance: cloudy, clear, mucoid, bloody, or other.		
3. Noted the odor: aromatic, ammoniacal, putrid, or fruity.		
4. Recorded the results.		

APPROVED: YES _____ NO ____

Evaluator's Signature Date

DUTY PERFORMING GENERAL LABORATORY PROCEDURES

PERFORMANCE OBJECTIVE 38

TASK

Perform cholesterol test.

STANDARD OF PERFORMANCE OF TASK

The cholesterol content of a serum specimen must be determined. The control and the test results must be accurate to ±3% transmittance as determined by the known control sample and the instructor's previously determined reading for the same specimen.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Colorimeter

ENABLING OBJECTIVES

1. Be able to communicate orally.
2. Understand test results in general.

RESOURCE

Atkinson. **The Medical Assistant,** pp. 189-91.

TEACHING ACTIVITIES

1. Assign student to visit a local cholesterol testing session and discuss with the class what was observed.
2. Discuss with student how to interpret the results of cholesterol tests and their significance.

PERFORMANCE OBJECTIVE 38

CRITERION-REFERENCED MEASURE

Practical Application

Given class discussion, the student will describe how to perform a cholesterol test.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 38

PERFORM CHOLESTEROL TEST

Student's Name **Date**

DIRECTIONS TO STUDENT	Set up the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.
DIRECTIONS TO EVALUATOR	Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	**Unacceptable**
1. Turned on colorimeter.		
2. Adjusted if necessary after the instrument had warmed up.		
3. Obtained directions for the determination from procedure manual.		
4. Assembled the necessary supplies and equipment.		
5. Performed the determination following manufacturer's directions.		
6. Read the test, the standard, and the known control in the colorimeter.		
7. Calculated the values for the unknown and the controls.		
8. Recorded and reported the results.		
9. Cleaned the work area.		

APPROVED: YES _____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING GENERAL LABORATORY PROCEDURES

PERFORMANCE OBJECTIVE 39

TASK

Perform finger-stick blood sugar screening test (Dextrostix).

STANDARD OF PERFORMANCE OF TASK

The value obtained should correspond exactly to the one obtained by the supervisor.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Physician's order as indicated
Disposable gloves
Bottle of reagents strips
Water in a wash bottle
Receptacle for water
Colorimeter
Standardized color chart
Sterile gauze sponges
Alcohol sponges
Disposable lancets
Small adhesive bandage
Watch/clock with second hand

ENABLING OBJECTIVES

1. Know procedures for finger-stick blood sugar test.
2. Be able to use color chart and/or testing equipment.

RESOURCE

Simmer. **Diversified Health Occupations**, 2nd edition, pp. 225-26.

TEACHING ACTIVITIES

1. Demonstrate the correct method of using screening test.
2. Have student practice doing the finger-stick blood sugar procedure.

PERFORMANCE OBJECTIVE 39

CRITERION-REFERENCED MEASURE

Practical Application

Given class demonstration, the student will demonstrate finger-stick blood sugar procedure techniques and accurately report results.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 39

PERFORM FINGER-STICK BLOOD SUGAR SCREENING TEST

Student's Name Date

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Assembled: a. a stop watch (or watch with a sweep second hand); b. bottle of Dextrostix; c. water in a wash bottle; and d. container to catch water from the wash bottle.		
2. Removed test strip from bottle; replaced lid immediately. Compared test area with "O" block on the color chart. Discarded if the two colors did not easily match.		
3. Performed the finger-stick according to the following criteria: a. wiped off first drop of blood; b. applied a large drop of capillary blood to cover the entire reagent area on printed side of strip; c. waited 60 seconds; d. quickly washed off blood using a wash bottle; and e. read results within one or two seconds after washing by holding the strip close to the color chart.		
4. Recorded the results.		

APPROVED: YES _____ NO ____

Evaluator's Signature Date

DUTY PERFORMING GENERAL LABORATORY PROCEDURES

PERFORMANCE OBJECTIVE 40

TASK

Perform urine pregnancy test.

STANDARD OF PERFORMANCE OF TASK

The manufacturer's instructions for the pregnancy test kit must be followed precisely and the test result of pregnancy presence or non-presence must correspond to the test result previously obtained by the instructor.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Pregnancy test kit
Manufacturer's instructions
Physician's order
Disposable gloves
Urine specimen container

ENABLING OBJECTIVES

1. Be able to follow written instructions.
2. Have general knowledge of pregnancy tests.

RESOURCES

1. Simmer. **Diversified Health Occupations**, 2nd edition, pp. 341-42.
2. Specific manufacturer's instructions for pregnancy test kit.

TEACHING ACTIVITIES

1. Describe and demonstrate how to assist the medical assistant in obtaining a urine specimen and using a pregnancy test kit.
2. Incorporate specific instructions to assure precise adherence to the manufacturer's instructions.
3. Practice exercise in performing test.

PERFORMANCE OBJECTIVE 40

CRITERION-REFERENCED MEASURE

Practical Application

Given class demonstration, the student will demonstrate ability to perform urine pregnancy test.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 40

PERFORM URINE PREGNANCY TEST

Student's Name Date

DIRECTIONS TO STUDENT	Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.
DIRECTIONS TO EVALUATOR	Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Assembled the necessary supplies.		
2. Performed the test following the manufacturer's directions precisely. NOTE: If a positive result is obtained, perform the 2-hour tube test, following the manufacturer's directions.		
3. Recorded the results.		

APPROVED: YES ____ NO ____

Evaluator's Signature Date

DUTY PERFORMING GENERAL LABORATORY PROCEDURES

PERFORMANCE OBJECTIVE 41

TASK

Perform urine specific gravity test.

STANDARD OF PERFORMANCE OF TASK

The specific gravity of a urine sample must be determined. The results must correspond exactly with the supervisor's results.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Physician's order
Disposable gloves
Urine specimen and container
Urinometer float, jar or cylinder
Paper towels or gauze

ENABLING OBJECTIVE

Know urine specimen collection process.

RESOURCE

Simmer. **Diversified Health Occupations**, 2nd edition, pp. 257-63.

TEACHING ACTIVITIES

1. Utilize text material to instruct student in the proper techniques of collecting and performing specific gravity tests on a urine specimen.
2. Incorporate specific explanations in the instruction of the use of the stem and float and accurately reading below the meniscus, as well as removal of air bubbles on top of the urine specimen.
3. Demonstrate the procedure to the students.
4. Allow student to explain and demonstrate the procedure to the instructor.
5. Encourage student to ask questions.
6. Assist with enabling student to locate all necessary supplies needed to collect and obtain specific gravity readings.

PERFORMANCE OBJECTIVE 41

CRITERION-REFERENCED MEASURE

Practical Application

Given instruction, demonstration and lab practice, the student will be able to perform urine specific gravity tests.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 41

PERFORM URINE SPECIFIC GRAVITY TESTS

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	**RATING**	
	Acceptable	**Unacceptable**
1. Assembled equipment.		
2. Cleaned jar and float.		
3. Washed hands.		
4. Identified patient and explained procedure.		
5. Obtained fresh urine specimen.		
6. Mixed urine well.		
7. Poured urine into jar or bottle to within one inch from top.		
8. Removed bubbles on urine with paper towel or gauze.		
9. Inserted urinometer float: a. grasped at top; b inserted slowly; c. twirled slightly; and d. avoided wetting top of the stem.		

CHECKLIST FOR PERFORMANCE TASK OBJECTIVE 41 (Continued)

PERFORM URINE SPECIFIC GRAVITY TESTS

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
10. Checked that float was away from sides and bottom of jar.		
11. Read float when it stopped spinning at eye level correctly to ± .001.		
12. Recorded reading correctly.		
13. Rechecked reading if necessary.		
14. Cleaned jar and float.		
15. Replaced all equipment.		
16. Washed hands.		

APPROVED: YES ____ NO ____

Evaluator's Signature Date

DUTY PERFORMING GENERAL LABORATORY PROCEDURES

PERFORMANCE OBJECTIVE 42

TASK

Prepare specimens for shipping and prepare requisitions for tests outside of office.

STANDARD OF PERFORMANCE OF TASK

Directions supplied by the laboratory must be followed for shipping specimens. The preparation must conform to U.S. government regulations concerning shipment of diagnostic specimens.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Physician's order
Disposable gloves
Appropriate specimen and container
Requisition form(s) with specific data
Written shipping regulations

ENABLING OBJECTIVE

Know shipping and requisition requirements.

RESOURCE

Aurandt. **The Professional Medical Secretary**, pp. 56-60.

TEACHING ACTIVITIES

1. Instruct student regarding the laboratory and U. S. government regulations for shipping specimens.
2. Lecture and demonstrate proper completion of requisition forms.
3. Discuss the pathogenic and non-pathogenic precautions necessary in handling specimens, and the preparation of such specimens for shipping in a safe and timely manner.
4. Explain the importance of obtaining correct patient information and the confidentiality of such information.
5. Practice exercise in preparing specimens.

PERFORMANCE OBJECTIVE 42

CRITERION-REFERENCED MEASURE

Practical Application

The student will prepare specimens for shipping following the regulations of the employer, laboratory, and U. S. government.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 42

PREPARE SPECIMENS FOR SHIPPING AND PREPARE REQUISITIONS FOR TESTS OUTSIDE OF OFFICE

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Determined whether specimen was pathogenic or non-pathogenic.		
2. Determined the types of specimens: a. tissue; b. body fluids; c. secretions; and d. excretions.		
3. Observed shipping regulations of laboratory and U.S. government.		
4. Chose the best method of preservation for type of specimen.		
5. Chose the best mode of transportation.		
6. Prepared request slips.		
7. Determined the best time for mailing.		
8. Prepared the specimens for shipping.		

APPROVED: YES ____ NO ____

Evaluator's Signature **Date**

PERFORMING STERILIZATION AND ASEPTIC TECHNIQUES

DUTY PERFORMING STERILIZATION AND ASEPTIC TECHNIQUES

PERFORMANCE OBJECTIVE 43

TASK

Clean and restock examination room.

STANDARD OF PERFORMANCE OF TASK

An examination room which has been used must be aseptically cleaned. New supplies must be appropriately placed and ready for use, and smooth surfaces must be sanitized.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Dirty examination room
Antiseptic solution
Table paper
Patient disposable gown
Draping material

ENABLING OBJECTIVES

1. Have knowledge of asepsis.
2. Have knowledge of office routines.

RESOURCE

Keir, Wise and Krebs-Shannon. **Medical Assisting: Clinical and Administrative Competencies**, p. 165.

TEACHING ACTIVITIES

1. Assign page 165 in **Medical Assisting: Clinical and Administrative Competencies** for class discussion.
2. Discuss the importance of cleaning the examination room.
3. Plan a field trip to a doctor's office to observe cleaning and restocking of examination rooms.
4. Demonstrate correct procedure to clean and restock an examination room.
5. Assist student in completing a minimum of three practice assignments. Each practice is to be checked by other students for correctness.

PERFORMANCE OBJECTIVE 43

CRITERION-REFERENCED MEASURE

Practical Application

Given an examination room which has been used, antiseptic solution, and other necessary supplies, the student will clean the room. New supplies must be placed and ready for use, and smooth surfaces must be sanitized.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 43

CLEAN AND RESTOCK EXAMINATION ROOM

Student's Name Date

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Discarded disposable linens in covered containers.		
2. Removed used instruments.		
3. Wrapped soiled dressing in paper and placed in covered receptacle.		
4. Damp dusted examination table and furniture using cloth dipped in disinfectant solution.		
5. Cleaned sink.		
6. Replaced supplies as needed.		
7. Changed all solutions at scheduled intervals.		

APPROVED: YES ____ NO ____

Evaluator's Signature Date

DUTY PERFORMING STERILIZATION AND ASEPTIC TECHNIQUES

PERFORMANCE OBJECTIVE 44

TASK

Sanitize instruments.

STANDARD OF PERFORMANCE OF TASK

Instruments must be opened or dismantled, rinsed in cold running water, scrubbed in detergent solution, rinsed and dried.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Soiled instruments
Scrub brush
Detergent
Gloves
Goggles/non-prescription glasses

ENABLING OBJECTIVES

1. Have knowledge of asepsis.
2. Have general knowledge of cleanliness.

RESOURCE

Simmer. **Diversified Health Occupations**, 2nd edition, pp. 166-85.

TEACHING ACTIVITIES

1. Assign pages 166-85 in **Diversified Health Occupations** for class discussion.
2. Have an O.R. housekeeping representative visit class to discuss importance of clean instruments.
3. Demonstrate correct procedures used in sanitizing instruments.
4. Assign student to demonstrate in class correct cleaning of instruments.
5. Assign student to complete a minimum of three practice assignments. Each practice is to be checked by other students for correctness.

PERFORMANCE OBJECTIVE 44

CRITERION-REFERENCED MEASURE

Practical Application

Given soiled instruments, detergent, and a brush, the student will sanitize the instruments. Instruments must be opened or dismantled, rinsed in cold running water, scrubbed in detergent solution, rinsed and dried.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 44

SANITIZE INSTRUMENTS

Student's Name Date

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Assembled soiled instruments, basin and detergent.		
2. Prepared detergent solution.		
3. Carefully removed knife blades from scalpel. Discarded (if disposable) in sharps container.		
4. Opened forceps and all hinged instruments.		
5. Rinsed instruments under cold running water.		
6. Placed in detergent solution.		
7. Scrubbed jaws, hinged areas, and grasping ends of individual instruments with brush.		
8. Rinsed well and dried with sterile towel.		

APPROVED: YES _____ NO _____

Evaluator's Signature Date

DUTY PERFORMING STERILIZATION AND ASEPTIC TECHNIQUES

PERFORMANCE OBJECTIVE 45

TASK

Disinfect instruments.

STANDARD OF PERFORMANCE OF TASK

Clean instruments must be opened for maximum surface exposure, completely submerged in disinfecting agent for the required time, rinsed, dried, and stored.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Clean instruments
Disinfectant
Water - source of heat, if boiling
Container to hold water or disinfectant
Gloves

ENABLING OBJECTIVES

1. Have knowledge of asepsis.
2. Have knowledge of cleanliness.

RESOURCE

Simmer. **Diversified Health Occupations**, 2nd edition, pp. 166-85.

TEACHING ACTIVITIES

1. Assign pages 166-85 in **Diversified Health Occupations** for class discussion.
2. Have a scrub person from the operating room visit class to discuss the importance of sterile instruments.
3. Demonstrate correct procedures used in disinfecting instruments.
4. Assign student to demonstrate in class correct cleaning of instruments.
5. Assign student to complete a minimum of three practice assignments for each method. Each practice is to be checked by other students for correctness.

PERFORMANCE OBJECTIVE 45

CRITERION-REFERENCED MEASURE

Practical Application

Given clean, dry instruments, disinfectant solution, and a pan, the student will disinfect the instruments.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 45

DISINFECT INSTRUMENTS

Student's Name Date

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Assembled equipment.		
2. Washed hands.		
3. Washed articles thoroughly; brushed serrated edges; rinsed and dried items thoroughly.		
4. Checked container for tight-fitting lid.		
5. Loaded properly, with space between items and hinged instruments open.		
6. Read manufacturer's instructions for directions on use of chemical solution.		
7. Poured solution over items to correct depth. During task, read label three times: before, during, and after pouring.		

CHECKLIST FOR PERFORMANCE TASK OBJECTIVE 45 (CONTINUED)

DISINFECT INSTRUMENTS

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
8. Checked bottle label to determine time required for disinfecting action.		
9. Left instrument in solution for recommended time.		
10. Washed hands before removing items.		
11. Used sterile transfer forceps to place item on sterile towel to dry.		
12. Stored in dust-free drawer or cabinet.		
13. Replaced equipment.		
14. Washed hands.		

APPROVED: YES ____ NO ____

Evaluator's Signature Date

DUTY PERFORMING STERILIZATION AND ASEPTIC TECHNIQUES

PERFORMANCE OBJECTIVE 46

TASK

Unwrap or open sterile packages, maintaining sterility of contents.

STANDARD OF PERFORMANCE OF TASK

Sterile packages must be unwrapped or opened by using sterile technique. Contents of packages must not be touched by any non-sterile surfaces.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Sterile package of equipment or supplies
Table or other flat surface
Sterile field (tray with sterile towel)

ENABLING OBJECTIVES

1. Know proper technique used in opening sterile packages.
2. Know significance of expiration dates.

RESOURCE

Simmer. **Diversified Health Occupations**, 2nd edition, pp. 77-88.

TEACHING ACTIVITIES

1. Utilize text materials to instruct the medical assistant in the proper techniques used in opening and maintaining sterility of packages and/or equipment.
2. Invite a nurse who handles infectious control to talk with the class.
3. Plan field trip to central supply department at a local hospital.
4. Provide practice time for student to develop skills in maintaining sterility of sterile packages/equipment.

PERFORMANCE OBJECTIVE 46

CRITERION-REFERENCED MEASURE

Practical Application

Given class demonstration and discussion the student will describe how to maintain sterility of packages and equipment during use.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 46

UNWRAP OR OPEN STERILE PACKAGES, MAINTAINING STERILITY OF CONTENTS

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Assembled equipment.		
2. Washed hands.		
3. Checked date and autoclave indicator on package.		
4. Kept work area free of all articles.		
5. Held package with point of top flap directed toward body: a. loosened fastener; b. grasped outer flap; c. pulled back and away; d. reached in from side; and e. allowed no contamination.		
6. Opened left flap, reached in from side, and pulled laterally, allowing no contamination.		
7. Opened right flap, reached in from side, and pulled laterally, allowing no contamination.		
8. Opened proximal edge and pulled over hand/table toward body, allowing no contamination.		

CHECKLIST FOR PERFORMANCE OBJECTIVE 46 (Continued)

UNWRAP OR OPEN STERILE PACKAGES, MAINTAINING STERILITY OF CONTENTS

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
9. Transferred item with correct mitten technique.		
10. Transferred item with correct drop technique.		
11. Transferred item with correct pick-up technique.		
12. Cleaned and replaced all equipment.		
13. Washed hands.		

APPROVED: YES _____ NO _____

Evaluator's Signature Date

DUTY PERFORMING STERILIZATION AND ASEPTIC TECHNIQUES

PERFORMANCE OBJECTIVE 47

TASK

Perform hand wash to decontaminate.

STANDARD OF PERFORMANCE OF TASK

Hands must be scrubbed, nails must be cleaned and all aseptic procedures followed.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Soap
Paper towels
Running water
Waste can
Hand brush and/or orange stick

ENABLING OBJECTIVES

1. Have knowledge of aseptic procedures.
2. Be attentive to details.

RESOURCES

1. Simmer. **Diversified Health Occupations,** 2nd edition, pp. 56-58.
2. Orangeburg-Calhoun Technical College, Nursery Division. **Learning Experience Guides**, pp. 5-6.

TEACHING ACTIVITIES

1. Use the text materials to instruct student regarding the proper technique of hand washing.
2. Provide practice time prior to return demonstration.
3. Special emphasis will be placed on avoiding splashing of uniform or parts of the body.
4. The length of time to be used, position of hand, and specific method used in turning off faucet will be stressed.

PERFORMANCE OBJECTIVE 47

CRITERION-REFERENCED MEASURE

Practical Application

Given class demonstration and discussion, the student will be able to wash hands according to recommended aseptic techniques.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 47

PERFORM HAND WASH TO DECONTAMINATE

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Assembled equipment.		
2. Turned on faucet.		
3. Regulated temperature of water.		
4. Wet hands with fingertips pointed down.		
5. Worked up a soapy lather.		
6. Scrubbed palms.		
7. Scrubbed tops of hands with opposite palm.		
8. Interlaced fingers to wash between.		
9. Cleaned nails with small brush and blunt edge of orange stick.		
10. Rinsed with fingertips pointed down.		
11. Turned faucet off with paper towel.		
12. Dried hands thoroughly.		

CHECKLIST FOR PERFORMANCE OBJECTIVE 47 (Continued)

PERFORM HAND WASH TO DECONTAMINATE

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
12. Placed towels in waste can.		
13. Turned off faucet with dry towel.		
14. Left area neat and clean.		
15. Washed hands before and after every procedure.		

APPROVED: YES _____ NO ____

Evaluator's Signature Date

DUTY PERFORMING STERILIZATION AND ASEPTIC TECHNIQUES

PERFORMANCE OBJECTIVE 48

TASK

Put on sterile gloves.

STANDARD OF PERFORMANCE OF TASK

The sterile glove surfaces must not contact non-sterile surfaces throughout the gloving process.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Sterile disposable gloves
Powder if necessary

ENABLING OBJECTIVE

1. Know how to handle sterile gloves without contaminating them.
2. Know steps involved in the process.

RESOURCE

Simmer. **Diversified Health Occupations**, 2nd edition, pp. 81-83.

TEACHING ACTIVITIES

1. Review text material.
2. Demonstrate proper method of donning sterile gloves, including removal, to prevent contamination of oneself.
3. Allow practice time for student prior to return demonstration.

PERFORMANCE OBJECTIVE 48

CRITERION-REFERENCED MEASURE

Practical Application

Given class demonstration, the student shall demonstrate the ability to properly don and remove sterile gloves.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 48 EVALUATION

PUT ON STERILE GLOVES

Student's Name Date

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Assembled equipment.		
2. Checked date and autoclave indicator.		
3. Washed and dried hands.		
4. Removed outer wrap: a. folded back distal edge; b. folded back left side; c. folded back right side; and d. pulled back proximal side.		
5. Opened inner wrap: a. handled only outside of wrap; b. maintained sterility of wrap and gloves; and c. positioned with cuffs close to body.		
6. Powdered hands over trash can/sink, if necessary.		
7. Donned first glove correctly: a. lifted out; b. inserted hand; c. held away from body; d. avoided counters; and e. maintained sterility of glove.		

CHECKLIST FOR PERFORMANCE OBJECTIVE 48 (Continued)

PUT ON STERILE GLOVES

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
8. Donned second glove correctly: a. put gloved hand under cuff; b. lifted out; c. inserted hand; and d. maintained sterility of gloves.		
9. Straightened cuffs: a. put gloved hand under cuff and pulled out and up; and b. maintained sterility of both gloves.		
10. Handled only sterile items with gloved hands.		

APPROVED: YES _____ NO _____

Evaluator's Signature ______________________ Date

DUTY PERFORMING STERILIZATION AND ASEPTIC TECHNIQUES

PERFORMANCE OBJECTIVE 49

TASK

Package linens for sterilization.

STANDARD OF PERFORMANCE OF TASK

An assortment of linen supplies must be packaged for sterilization. Packages must be small, loosely packaged, secured, labeled and dated.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Linen towels
Autoclave indicators
Outer wrapper (paper or cloth)
Label/pen for identification of package

ENABLING OBJECTIVE

Know how to prepare linens for sterilization.

RESOURCE

Simmers. **Diversified Health Occupations**, 2nd edition, pp. 65-66.

TEACHING ACTIVITIES

1. Provide lecture and demonstration on the wrapping of linens for sterilization.
2. Provide practice and return demonstration schedule for student compliance.

PERFORMANCE OBJECTIVE 49

CRITERION-REFERENCED MEASURE

Practical Application

Given class demonstration, the student will be able to properly wrap linens for sterilization.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 49

PACKAGE LINENS FOR STERILIZATION

Student's Name Date

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Assembled equipment.		
2. Washed hands.		
3. Checked to make sure linen was cleaned and dried.		
4. Folded in half lengthwise.		
5. Fanfolded into sections.		
6. Folded so all sections were even.		
7. Turned back corner tab.		
8. Wrapped in outer wrapper: a. folded bottom corner with tab; b. folded right corner with tab; c. folded left corner with tab; d. folded final corner and tucked in closure; e. removed air pockets.		
9. Sealed packages with tape.		

CHECKLIST FOR PERFORMANCE OBJECTIVE 49 (CONTINUED)

PACKAGE LINENS FOR STERILIZATION

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
10. Used autoclave indicator if needed.		
11. Labeled with contents and dated.		
12. Replaced equipment.		
13. Washed hands.		

APPROVED: YES _____ NO _____

Evaluator's Signature ______________________ Date

DUTY PERFORMING STERILIZATION AND ASEPTIC TECHNIQUES

PERFORMANCE OBJECTIVE 50

TASK

Sterilize supplies and instruments using the moist heat method.

STANDARD OF PERFORMANCE OF TASK

An assortment of packaged instruments and supplies must be sterilized using the moist heat method. The standards included on the checklist must be observed.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Steam-pressure autoclave
Sterilization indicators
Storage places
Supplies

ENABLING OBJECTIVES

1. Know proper positioning of all instruments and materials in an autoclave.
2. Identify the time, temperature, and pressure required for sterilization of different items.
3. Be able to interpret sterilization indicators and know how to properly store items.

RESOURCES

1. Simmers. **Diversified Health Occupations**, 2nd edition, pp. 58-61.
2. Shea. **Mosby's Fundamentals of Medical Assisting**, pp. 352-56.
3. Autoclave direction booklet.

TEACHING ACTIVITIES

1. Discuss with class the specific objectives of sterilization.
2. Describe the specifics of an autoclave, to include reading a direction booklet which is provided with the autoclave.
3. Arrange for a tour of a health care facility and/or physician's office to observe demonstration of an autoclave, storage of sterile supplies, and use of sterilization indicators.

PERFORMANCE OBJECTIVE 50

CRITERION-REFERENCED MEASURE

Practical Application

Given classroom instruction the student will sterilize supplies and instruments using the moist heat method.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 50

STERILIZE SUPPLIES AND INSTRUMENTS USING THE MOIST HEAT METHOD

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Sorted packages according to content.		
2. Checked time and temperature chart.		
3. Preheated autoclave.		
4. Arranged items on tray allowing for circulation of steam through and around each package.		
5. Set timer and temperature gauges according to load requirements.		
6. Locked autoclave door.		
7. Vented steam when timer rang and cooled and dried items.		
8. Unloaded autoclave.		

APPROVED: YES ____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING STERILIZATION AND ASEPTIC TECHNIQUES

PERFORMANCE OBJECTIVE 51

TASK

Sterilize supplies using the dry heat method.

STANDARD OF PERFORMANCE OF TASK

An assortment of items must be sterilized by the dry heat method. Standards included on checklist must be observed.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Dry heat autoclave
Sharp instruments such as knife blades, glass rings
Powder, oils, ointments, dressing
Rubber supplies

ENABLING OBJECTIVES

1. Identify the kinds of items that can be sterilized by dry heat method.
2. Identify a source of dry heat in the home.
3. Know exposure time, temperature requirement, and tolerance of items.
4. Be able to load and unload sterilized supplies safely.

RESOURCES

1. Shea. **Mosby's Fundamentals of Medical Assisting**, p. 358.
2. Simmers. **Diversified Health Occupations**, 2nd edition, p. 60.
3. Direction booklet for autoclave.

TEACHING ACTIVITIES

1. Give specific objectives for performing sterilization procedures.
2. Arrange for an on-campus tour of the school kitchen with particular attention to the conventional ovens.
3. Describe the similarities of a conventional oven and a dry heat autoclave.
4. Invite a representative from a central processing hospital supply company to describe/discuss the equipment used for sterilization.
5. Demonstrate sterilization using the dry heat method.
6. Have student practice Teaching Activity 5.

PERFORMANCE OBJECTIVE 51

CRITERION-REFERENCED MEASURE

Practical Application

Given classroom instruction, the student will sterilize equipment using the dry heat method.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 51

STERILIZE SUPPLIES USING THE DRY HEAT METHOD

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	**RATING**	
	Acceptable	**Unacceptable**
1. Separated packaged items according to type of contents.		
2. Checked time and temperature chart.		
3. Preheated autoclave.		
4. Arranged items on tray providing for adequate circulation of heat through each package.		
5. Loaded chamber.		
6. Set timer and temperature gauge according to type of materials in autoclave.		
7. Observed safety precautions in using autoclave.		
8. Cooled and stored supplies.		

APPROVED: YES _____ NO _____

Evaluator's Signature **Date**

DUTY PERFORMING STERILIZATION AND ASEPTIC TECHNIQUES

PERFORMANCE OBJECTIVE 52

TASK

Wrap instruments for sterilization.

STANDARD OF PERFORMANCE OF TASK

An assortment of instruments must be wrapped for sterilization. Instruments must be placed so that all areas are exposed to heat; they must be sealed securely in the package, labeled as to type of instrument, and dated.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Forceps
Hemostat
Paper or muslin autoclave wrap
Autoclave indicator
Pen or pencil
Adhesive or masking tape (if indicator tape is not used)

ENABLING OBJECTIVES

1. Know cleaning instruments.
2. Identify damaged or unclean instruments.

RESOURCES

1. Mosby. **Fundamentals of Medical Assisting**, pp. 349-51.
2. Simmers. **Diversified Health Occupations,** 2nd edition, pp. 81-82.

TEACHING ACTIVITIES

1. Present a lecture on wrapping instruments for sterilization.
2. Conduct a hands-on demonstration of wrapping instruments for sterilizing.
3. Assign student to practice groups to become familiar with instruments and wrapping for sterilization.
4. Have the class prepare demonstration on wrapping instruments.
5. Give specific objectives for wrapping instruments for sterilization.

PERFORMANCE OBJECTIVE 52

CRITERION-REFERENCED MEASURE

Practical Application

The student will wrap instruments (hemostats, forceps) in paper or muslin and label.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 52

WRAP INSTRUMENTS FOR STERILIZATION

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	**RATING**	
	Acceptable	**Unacceptable**
1. Assembled wrapping supplies.		
2. Assembled and sorted instruments.		
3. Inspected instruments for defects.		
4. Opened forceps.		
5. Inserted instrument into bag, envelope or wrapper.		
6. Sealed package and applied indicator tape.		
7. Labeled and dated package.		

APPROVED: YES ____ NO ____

Evaluator's Signature **Date**

PERFORMING CLINICAL OFFICE PROCEDURES

DUTY PERFORMING CLINICAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 53

TASK

Assist doctor with minor surgery.

STANDARD OF PERFORMANCE OF TASK

Sterile techniques must be observed throughout the procedure. Standards included on the checklist must be observed.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Tape
Tray with cover or mayo stand
Plastic bag/waste container
2-6 towels
Sterile gloves
Scalpel
Basin
Needles
Cotton balls/gauze
Hemostat forceps
Surgical scissors
Surgical gown
Transfer forceps
Suture material
Antiseptic solution
Needle holder
Anesthetic solution
Retractors
Syringe needle
Tissue forceps

ENABLING OBJECTIVES

1. Identify specific instruments to be used for surgical procedure.
2. Use good communication skills.
3. Identify the correct position for the patient.
4. Have general knowledge of common minor surgeries.

RESOURCES

1. Shea. **Mosby's Fundamentals of Medical Assisting**, pp. 362-76.
2. Simmers. **Diversified Health Occupations**, 2nd edition, pp. 274-78.

TEACHING ACTIVITIES

1. Explain the reason for preparing the patient mentally and physically for minor surgery.
2. Have groups of students set up a surgical tray for minor surgery.
3. Assign student role play in groups, preparing the patient for minor surgery and assisting the doctor.
4. Present lecture on shaving the surgical site and applying sterile drapes to expose surgical sites.

PERFORMANCE OBJECTIVE 53

CRITERION-REFERENCED MEASURE

Practical Application

The student will prepare a tray for minor surgery and will also prepare a patient for minor surgery.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 53

ASSIST DOCTOR WITH MINOR SURGERY

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Prepared self for surgery: a. put on mask and cap; b. performed surgical scrub; and c. put on sterile gown and gloves.		
2. Observed sterile technique throughout procedure.		
3. Checked and counted instruments.		
4. Handed doctor the instruments as needed.		
5. Had collection basins available for discharge, blood, or discarded dressings.		
6. Put soiled instruments out of patient's sight. Did not allow them to touch tables or anything they could contaminate.		
7. Counted instruments immediately after use to be sure none were disposed of with linens.		

APPROVED: YES ____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING CLINICAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 54

TASK

Assist with dressing change.

STANDARD OF PERFORMANCE OF TASK

The dressing tray must contain all instruments and supplies needed, as verified by the instructor's control tray; the patient must be prepared, and the wound must be exposed; and assistance must be provided the doctor without delay.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Dressing tray
Antiseptic solution
Gauze sponges and pads
Gloves
Tissue forceps
Scissors
Adhesive or nonallergenic tape
Plastic bag
Basin
Waste can
Hemostat

ENABLING OBJECTIVES

1. Identify dressings to be used for specific injuries, wounds,or burns.
2. Have general knowledge of instruments needed for dressing changes.
3. Have general knowledge of sterile techniques.

RESOURCES

1. Shea. **Mosby's Fundamentals of Medical Assisting**, pp. 385-91.
2. Simmer. **Diversified Health Occupations**, 2nd edition, pp. 55, 83-85.

TEACHING ACTIVITIES

1. Present a lecture on techniques of applying dressings according to the extent and location of wounds, injuries, or burns.
2. Conduct a hands-on demonstration on applying various types of dressings.
3. Instruct class to bring supplies that can be used for dressings.
4. Instruct student to apply various types of dressings on each other.
5. Assign student to a practice group to familiarize him/her with various types of dressings and their purposes.

PERFORMANCE OBJECTIVE 54

CRITERION-REFERENCED MEASURE

Practical Application

Given classroom instruction, the student will assist with various dressing changes.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 54

ASSIST WITH DRESSING CHANGE

Student's Name _______________ Date _______________

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Determined location and type of dressing to be changed.		
2. Assembled instruments and supplies.		
3. Prepared dressing tray.		
4. Prepared patient.		
5. Washed hands before and after dressing change.		
6. Exposed site of wound.		
7. Removed soiled dressing, wrapped in paper towel and discarded in covered receptacle.		
8. Provided physician with materials as needed.		
9. Supported extremity or head as physician cleaned and dressed wound (if necessary).		
10. Secured dressing as directed.		
11. Prepared patient for dismissal.		

APPROVED: YES ____ NO ____

Evaluator's Signature _______________ Date _______________

DUTY PERFORMING CLINICAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 55

TASK

Assist with proctoscopic examination.

STANDARD OF PERFORMANCE OF TASK

The necessary proctoscopic equipment must be assembled and prepared, the patient must be prepared, and assistance must be provided the doctor as required during the examination.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Sigmoidoscope
Anoscope
Rectal speculum
Insufflator
Probe with bulb tip
Gloves (disposable)
Finger cots
Long cotton applicator
Lubricating jelly
Basin of water
Gauze sponges
Suction pump

ENABLING OBJECTIVES

1. Have good communications skills.
2. Have general knowledge of patient positions.

RESOURCE

Shea. **Mosby's Fundamentals of Medical Assisting**, pp. 323-26.

TEACHING ACTIVITIES

1. Present lecture on proctosigmoidoscopy examination.
2. Assign student to practice groups in order to familiarize him/her with equipment used.
3. Conduct demonstration on setting up tray for examination.
4. Have student role-play preparing, draping, and instructing a patient who is to receive a proctoscopic exam.

PERFORMANCE OBJECTIVE 55

CRITERION-REFERENCED MEASURE

Practical Application

Given classroom instruction, the student will assist with a proctoscopic examination.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 55

ASSIST WITH PROCTOSCOPIC EXAMINATION

Student's Name Date

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Assembled the equipment and supplies normally used in protoscopic exam.		
2. Prepared equipment by checking lights on the illuminated instrument for loose bulbs, then correctly positioning obturators, basin, instruments, and suction pump.		
3. Prepared patient with necessary laxative or enema; then explained exam procedures to patient. (Most patients are very apprehensive about this examination.)		
4. Had patient empty bladder and saved specimen (if required), then completed the following activities: a. had patient disrobe and put on gown; b. assisted patient into the position designated by the doctor to assure accessibility of the rectum and sigmoid colon; and c. draped the patient and placed small towel directly under the anus and over the perineal area.		

CHECKLIST FOR PERFORMANCE OBJECTIVE 55 (Continued)

ASSIST WITH PROCTOSCOPIC EXAMINATION

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
5. Assisted the doctor during examination by providing tissues, instruments, and applicators as needed; then placed suction tubing and instruments in basin of water; and then received and processed specimen.		
6. Assisted patient up after examination. Did not let patient rise too rapidly because of the possibility of dizziness.		

APPROVED: YES _____ NO _____

Evaluator's Signature Date

DUTY PERFORMING CLINICAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 56

TASK

Assist with biopsy procedure.

STANDARD OF PERFORMANCE OF TASK

Sterile treatment tray must include all the instruments and supplies the doctor will need. Patient must be prepared. Biopsy specimen must be prepared for laboratory. Record must be made of exact position and location of biopsy site.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Materials for preparing the skin
Laboratory requisition
Local anesthetic setup
Sterile gloves
Mosquito forceps, straight and curved
Kelly forceps, straight and curved
Scalpel handle and blade
Electrocantery unit and lubricated lead plate
Aspiration needle
Toothed tissue forceps
Suture scissors
Suture material and needle
Specimen bottle

ENABLING OBJECTIVES

1. Identify types of instruments needed for biopsy.
2. Prepare specimen for mailing to pathology lab.
3. Identify type and site of biopsy.

RESOURCE

Shea. **Mosby's Fundamentals of Medical Assisting**, pp. 379-80.

TEACHING ACTIVITIES

1. Present lecture on materials for removing foreign bodies in subcutaneous tissues, small growths, and tissue biopsy specimens.
2. Conduct a discussion on post operative care for patient having a biopsy.
3. Assign student to group to role play assisting with a biopsy.
4. Discuss with class how to prepare specimens for mailing to pathology labs.
5. Assign student to list, in order, steps for preparing a sterile tray for a biopsy.

PERFORMANCE OBJECTIVE 56

CRITERION-REFERENCED MEASURE

Practical Application

Given class discussion, the student will prepare for and assist with the biopsy procedure indicated by the instructor.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 56

ASSIST WITH BIOPSY PROCEDURE

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Determined type (needle, skin, cervical, or other) and site of biopsy.		
2. Assembled needed materials on sterile treatment tray, including rectal biopsy punch, Wittner biopsy punch, Novak biopsy curette, Eisenstein cervical spatula, and biopsy needle.		
3. Explained procedure to patient, then positioned and prepared patient.		
4. Assisted with administration of local anesthetic (if necessary).		
5. Received and cared for biopsy specimens.		
6. Recorded exact position and location of biopsy site.		

CHECKLIST FOR PERFORMANCE OBJECTIVE 56(Continued)

ASSIST WITH BIOPSY PROCEDURE

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
7. Explained postoperative instructions to patient.		
8. Prepared specimen for mailing to pathology laboratory.		
9. Cleaned examination room.		

APPROVED: YES _____ NO ____

Evaluator's Signature Date

DUTY PERFORMING CLINICAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 57

TASK

Perform visual acuity tests.

STANDARD OF PERFORMANCE OF TASK

A patient must be prepared for visual testing. Adjust the eye chart and record results from the visual testing.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Snellen charts (letters, pictures)
Chalk/tape
Yardstick
Small disposable cups
Pencil/pen
Pointer
Paper

ENABLING OBJECTIVES

1. Be able to use Snellen charts.
2. Identify obvious watery eyes, eye irritation(s), squinting.
3. Operate a vision screening center.

RESOURCES

1. Shea. **Mosby's Fundamentals of Medical Assisting**, pp. 327-30.
2. Simmers. **Diversified Health Occupations,** 2nd edition, pp. 266-68.

TEACHING ACTIVITIES

1. Present lecture on vision screening.
2. Invite school nurse to conduct workshop on vision screening for preschool and school age students.
3. Instruct student to screen eyes of classmates.
4. Discuss how to accurately record results of screening.
5. Conduct class discussion on abnormalities to be observed during vision screening.

PERFORMANCE OBJECTIVE 57

CRITERION-REFERENCED MEASURE

Practical Application

Given a patient needing a vision check, the student will screen the vision and record results on appropriate document.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 57

PERFORM VISUAL ACUITY TESTS

Student's Name ____________________ Date ____________

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Adjusted visual acuity chart to eye level.		
2. Marked line 20 feet from chart.		
3. Explained to patient what was to be done.		
4. Tested one eye at a time with and without glasses.		
5. Recorded patient's reactions during test.		
6. Recorded response of each eye following test.		

APPROVED: YES _____ NO ____

Evaluator's Signature ____________________ Date ____________

DUTY PERFORMING CLINICAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 58

TASK

Drape patient.

STANDARD OF PERFORMANCE OF TASK

A patient must be draped for the examination to be performed by the doctor. Draping must be appropriate for the type of examination. The part of the body being examined must be exposed.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Draper or cover
Examination table stirrups
Paper or sheets
Small towel
Small pillow

ENABLING OBJECTIVES

1. Identify Sims, lithotomy, knee-chest, proctological (or jack knife), dorsal recumbent, Trendelenburg, and Fowler's positions.
2. Have general knowledge of procedures that require specific draping.

RESOURCES

1. Shea. **Mosby's Fundamentals of Medical Assisting**, pp. 306-11.
2. Simmers. **Diversified Health Occupations**, 2nd edition, pp. 260-64.

TEACHING ACTIVITIES

1. Present lecture on draping the patient.
2. Assign student to practice group in order to familiarize him/her with positions used for examination.
3. Conduct a hands-on demonstration of draping for examination.
4. Discuss problems in draping patient in various positions.

PERFORMANCE OBJECTIVE 58

CRITERION-REFERENCED MEASURE

Practical Application

The student will drape the part of the body that is being examined and expose that part of the body only when the physician is about to begin the examination.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 58

DRAPE PATIENT

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Determined method of positioning patient as directed by physician for exam.		
2. Explained the procedure for doctor's examination.		
3. Provided gown and privacy for patient to disrobe as required.		
4. Positioned patient in proper alignment.		
5. Draped patient, providing maximum exposure of area to be examined but covering the rest of the patient.		

APPROVED: YES _____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING CLINICAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 59

TASK

Apply roller bandage.

STANDARD OF PERFORMANCE OF TASK

Bandage should be appropriate for the type of wound; it should be smooth and supportive, and not restrict flow of blood.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Sterile dressing supplies
Bandages/sling

ENABLING OBJECTIVES

1. Know purpose of applying roller bandage.
2. Identify the signs of poor circulation.
3. Have knowledge of anchoring roller bandage.

RESOURCES

1. Shea. **Mosby's Fundamentals of Medical Assisting**, pp. 392-95.
2. Simmers. **Diversified Health Occupations, 2nd edition**, pp. 130-34
3. American Red Cross. **Standard First Aid and Personal Safety**.

TEACHING ACTIVITIES

1. Present lecture on applying a roller bandage.
2. Conduct a hands-on demonstration of applying a roller bandage.
3. Have student apply circular, spiral, figure-of-eight, monocular (eye), and melon or anchored recurrent (heat) bandages on other students.
4. Discuss normal problems encountered in applying various types of roller bandages.

PERFORMANCE OBJECTIVE 59

CRITERION-REFERENCED MEASURE

Practical Application

Given class discussion and demonstration, student will apply a roller bandage to a patient.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 59

APPLY ROLLER BANDAGE

Student's Name Date

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Determined type of roller bandage required by wound.		
2. Always began at distal point and wrapped toward heart.		
3. Elevated or kept part being wrapped level with heart.		
4. Started with the inside of the bandage facing the operator; wrapped around the starting point two or three times and anchored with tape.		
5. Never fastened or secured over bony area or over the injury.		
6. Overlapped layers slightly and wrapped smoothly back and forth distributing evenly. (Bandage should be firm and supportive, but should not constrict blood flow.)		

CHECKLIST FOR PERFORMANCE OBJECTIVE 59 (continued)

APPLY ROLLER BANDAGE

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
7. Did not allow skin surfaces, such as two fingers, to touch each other under the bandage. Placed gauze between the fingers before bandaging.		
8. Fastened the end of the bandage with tape, safety pin or clamp, or split the end of the bandage and tied.		

APPROVED: YES _____ NO ____

Evaluator's Signature Date

DUTY PERFORMING CLINICAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 60

TASK

Apply triangular bandage.

STANDARD OF PERFORMANCE OF TASK

A triangular bandage must be applied to a patient's head wound. The bandage must be secured and comfortable to the patient.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Sterile dressing
Bandages
Triangular bandage

ENABLING OBJECTIVES

1. Identify types of injuries which require triangular bandages.
2. Explain the steps in making a cravat bandage from a triangular bandage.

RESOURCES

1. American Red Cross. **Standard First Aid and Personal Safety**.
2. Shea. **Mosby's Fundamentals of Medical Assisting**, pp. 392-95.
3. Simmers. **Diversified Health Occupations**, 2nd edition, pp. 392-93.

TEACHING ACTIVITIES

1. Conduct lecture/discussion on types of injuries that require the application of a triangular bandage.
2. Show filmstrip on applying a cravat and sling.
3. Demonstrate to class how to apply cravat and triangular bandages.
4. Assign student to work in group in order to familiarize him/her with applying tubular bandages.
5. Have student practice applying triangular bandages on others.

PERFORMANCE OBJECTIVE 60

CRITERION-REFERENCED MEASURE

Practical Application

The student will apply triangular bandages to a patient with a head wound and an arm injury.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 60

APPLY TRIANGULAR BANDAGE

Student's Name Date

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Placed the widest part of the triangle on the forehead close to the eyebrows.		
2. Pulled the long ends around the head, near the neck, crossed, brought ends back to the forehead, and tied the ends.		
3. Tucked the third part of the triangle into the folds above the neck.		
4. Made sure the bandage was secure and comfortable.		

APPROVED: YES ____ NO ____

Evaluator's Signature Date

DUTY PERFORMING CLINICAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 61

TASK

Apply tubular bandage.

STANDARD OF PERFORMANCE OF TASK

A tubular bandage with wire applicator must be applied to a patient's finger or arm wound. The bandage must mold to exact shape of finger or arm and must provide cover and/or support without bulkiness.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Tubular bandage with a wire applicator
Patient with finger or arm wound

ENABLING OBJECTIVES

1. Identify cage-type applicator that fits area to be bandaged and size of tubegauze.
2. Be able to load the tubegauze onto applicator.

RESOURCES

1. Shea. **Mosby's Fundamentals of Medical Assisting**, pp. 392, 397-400.
2. Manufacturer's instructions for tubular gauze.

TEACHING ACTIVITIES

1. Discuss the one basic method used for application of the tubegauze to any body part being bandaged.
2. Assign student to read basic instructions for all tubegauze applications.
3. Assign student to practice group in order to familiarize him/her with tubegauze.
4. Instruct student to apply a tubegauze by demonstration.

PERFORMANCE OBJECTIVE 61

CRITERION-REFERENCED MEASURE

Practical Application

The student will select the correct cage-type and size tubegauze and apply to a wound on the finger or arm of a patient.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 61

APPLY TUBULAR BANDAGE

Student's Name Date

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Read manufacturer's instructions for using tubular gauze and applicator.		
2. Applied bandage as directed.		

APPROVED: YES _____ NO _____

Evaluator's Signature Date

DUTY PERFORMING CLINICAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 62

TASK

Control bleeding by applying tourniquet.

STANDARD OF PERFORMANCE OF TASK

A tourniquet must be applied to a patient who is bleeding severely. Tourniquet must be tied 1 1/2" to 2" above bleeding point and sufficient construction accomplished by twisting and securing dowel in knot.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Cravat bandage
Strip of cloth (2" width)
Stick
Paper
Pencil

ENABLING OBJECTIVES

1. Have general knowledge of providing first aid for bleeding.
2. Identify the materials necessary for application of a tourniquet.

RESOURCES

1. Shea. **Mosby's Fundamentals of Medical Assisting**, pp. 603-05.
2. Simmers. **Diversified Health Occupations**, 2nd edition, pp. 101-03.
3. American Red Cross. **Standard First Aid and Personal Safety.**

TEACHING ACTIVITIES

1. Present lecture on application of the tourniquet.
2. Assign student to practice group in order to familiarize him/her with tourniquet equipment.
3. Conduct demonstration on application of tourniquet.
4. Assign student to group to practice applying tourniquets to desk legs.

PERFORMANCE OBJECTIVE 62

CRITERION-REFERENCED MEASURE

Practical Application

The student will apply a tourniquet to a desk leg according to instructions provided in class.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 62

CONTROL BLEEDING BY APPLYING TOURNIQUET

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Applied tourniquet to patient only if other means of controlling bleeding failed. NOTE: This is critical since a tourniquet may restrict arterial blood supply, causing gangrene in the extremity.		
2. Placed tourniquet 1 1/2" to 2" above wound.		
3. Placed center of triangle above wound, brought tails around and above triangle, and tied knot.		
4. Placed dowel in knot, then turned dowel until bleeding was controlled.		
5. Tied stick in place with extra cloth. Note: The American Red Cross instructs learners to treat the victim for shock after tourniquet is applied. They also suggest pinning a note on patient giving time and date tourniquet is applied.		
6. Summoned help from physician.		
7. Loosened tourniquet only as instructed by physician.		

APPROVED: YES ____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING CLINICAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 63

TASK

Control bleeding using direct-pressure method.

STANDARD OF PERFORMANCE OF TASK

The direct-pressure method of controlling bleeding must be applied to a patient who is bleeding mildly. Actual point of bleeding must be covered with a sterile compress and pressure applied until bleeding stops.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Patient who is bleeding
Sterile compress or clean cloth

ENABLING OBJECTIVES

1. Know when to use direct-pressure.
2. Identify the steps in applying direct-pressure.

RESOURCES

1. Simmers. **Diversified Health Occupations**, 2nd edition, pp. 98-102.
2. Shea. **Mosby's Fundamentals of Medical Assisting**, p. 603.
3. American Red Cross. **Standard First Aid and Personal Safety.**

TEACHING ACTIVITIES

1. Present lecture on direct-pressure to control bleeding.
2. Conduct a hands-on demonstration of applying direct-pressure.
3. Demonstrate applying direct-pressure to control bleeding of imaginary wound.
4. Have student apply direct-pressure to classmates' imaginary wounds.

PERFORMANCE OBJECTIVE 63

CRITERION-REFERENCED MEASURE

Practical Application

Given class demonstration, the student will use the direct-pressure method to control bleeding.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 63

CONTROL BLEEDING USING DIRECT-PRESSURE METHOD

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Exposed the injured area.		
2. Washed the skin surface.		
3. Determined the bleeding point.		
4. Applied sterile gauze compress.		
5. Applied direct-pressure to the compress until bleeding was controlled.		

APPROVED: YES _____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING CLINICAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 64

TASK

Control bleeding using indirect-pressure method.

STANDARD OF PERFORMANCE OF TASK

The indirect-pressure method must be applied to a patient who is bleeding severely. Pressure must be applied to the nearest pressure point between the location of bleeding and the heart.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Patient that is bleeding severely
Sterile compress or cloth

ENABLING OBJECTIVES

1. Identify pressure points.
2. Know where to find location of pressure points according to injury.

RESOURCES

1. Shea. **Mosby's Fundamentals of Medical Assisting**, p. 603.
2. Simmers. **Diversified Health Occupations**, 2nd edition, pp. 99-100.

TEACHING ACTIVITIES

1. Present lecture on location of pressure points.
2. Conduct a discussion on applying indirect-pressure.
3. Demonstrate applying indirect-pressure on a student.
4. Assign student to group to practice applying indirect-pressure.
5. Have student practice applying indirect-pressure on classmates.

PERFORMANCE OBJECTIVE 64

CRITERION-REFERENCED MEASURE

Practical Application

Given a bleeding patient, the student will initiate procedures to control severe bleeding using the indirect-pressure method.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 64

CONTROL BLEEDING USING INDIRECT-PRESSURE METHOD

Student's Name ____________________ Date ____________

DIRECTIONS TO STUDENT — Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR — Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Exposed the injured area.		
2. Washed the skin surface.		
3. Determined the bleeding point.		
4. Applied pressure to the nearest pressure point between the bleeding area and the heart.		
5. Summoned physician as soon as possible.		
6. Treated patient for shock.		

APPROVED: YES _____ NO ____

Evaluator's Signature ____________________ Date ____________

DUTY PERFORMING CLINICAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 65

TASK

Care for patient who has fainted.

STANDARD OF PERFORMANCE OF TASK

A patient who has fainted (or is on the verge of fainting) must be revived. All steps identified on checklist that are needed to revive patient should be performed.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Patient who has fainted or is on the verge of fainting

ENABLING OBJECTIVES

1. Know general symptoms of fainting.
2. Identify the necessity for victim lying flat on back.

RESOURCES

1. Shea. **Mosby's Fundamentals of Medical Assisting**, p. 612.
2. Simmers. **Diversified Health Occupations**, 2nd edition, pp. 125-26, 128.

TEACHING ACTIVITIES

1. Present lecture on fainting.
2. Conduct class discussion on conditions that could be related to fainting.
3. Instruct student how to care for a fainting victim.
4. Assign student to practice group to familiarize him/her with symptoms of fainting.

PERFORMANCE OBJECTIVE 65

CRITERION-REFERENCED MEASURE

Practical Application

The student will initiate the necessary steps to revive a fainting or fainted patient.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 65

CARE FOR PATIENT WHO HAS FAINTED

Student's Name Date

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Lowered the patient's head until faint feeling had passed; if patient was lying down, kept head and shoulders flat, and raised legs from the hips.		
2. Provided fresh air to patient.		
3. Loosened patient's clothing, especially around neck and waist.		
4. Administered smelling salts or ammonia.		
5. Stayed with patient until color returned and pulse and respiration were normal.		

APPROVED: YES _____ NO ____

Evaluator's Signature Date

DUTY PERFORMING CLINICAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 66

TASK

Prepare for a catheterization.

STANDARD OF PERFORMANCE OF TASK

The treatment tray must contain specified catheter and all necessary supplies, and the patient must be positioned and draped.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Catheters
Sterile gloves
Cotton balls
Antiseptic solution
Lubricant

ENABLING OBJECTIVES

1. Identify the reasons for catheterization.
2. Have general knowledge of sterile technique.
3. Explain procedure to patient.
4. Identify the size and type of catheter required.

RESOURCE

Rosdahl. **Textbook of Basic Nursing**, 2nd edition, pp. 289-91.

TEACHING ACTIVITIES

1. Lecture on catheterization.
2. Demonstrate catheterization on mannequin.
3. Instruct student how to catheterize mannequin.
4. Assign student to practice group to familiarize him/her with catheterization procedure.

PERFORMANCE OBJECTIVE 66

CRITERION-REFERENCED MEASURE

Practical Application

Given class discussion, the student will describe how to catheterize a patient and/or mannequin.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 66

PREPARE FOR A CATHETERIZATION

Student's Name Date

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Explained the procedure to the patient.		
2. Maintained aseptic technique throughout the procedure.		
3. Determined size and type of catheter to be used.		
4. Assembled materials and prepared sterile tray.		
5. Poured antiseptic solution into basins; avoided spilling solution on the tray.		
6. Placed lubricant on sterile sponge on tray.		
7. Covered and placed tray in examination room.		
8. Positioned and draped the patient.		

APPROVED: YES _____ NO ____

Evaluator's Signature Date

DUTY PERFORMING CLINICAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 67

TASK

Prepare room for minor surgery.

STANDARD OF PERFORMANCE OF TASK

A room must be prepared for minor surgery, along with the needed supplies and equipment for the surgery. Standards included on the checklist must be observed.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Room (examining)
Disinfectant
Instrument tray
Sterile supplies
Drape sheets
Mayo stand

ENABLING OBJECTIVES

1. Have general knowledge of aseptic technique.
2. Identify supplies needed for specific surgery.

RESOURCE

Shea. **Mosby's Fundamentals of Medical Assisting**, pp. 374-76.

TEACHING ACTIVITIES

1. Have student present in class a review of sterile and aseptic techniques.
2. Conduct a discussion on preparation of a room for minor surgery.
3. Assign student to practice group to familiarize him/her with setting up a room for minor surgery.
4. Arrange a tour for student to visit a doctor's office to observe preparation of a room for minor surgery.
5. Have student compile a list of materials used in preparing a room for minor surgery.

PERFORMANCE OBJECTIVE 67

CRITERION-REFERENCED MEASURE

Practical Application

Given class discussion, the student will prepare an examination room for minor surgery.

Method of Evaluating Practical Application

The instructor will evaluate by obsevation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 67

PREPARE ROOM FOR MINOR SURGERY

Student's Name **Date**

DIRECTIONS TO STUDENT Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.

DIRECTIONS TO EVALUATOR Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	**RATING**	
	Acceptable	**Unacceptable**
1. Cleaned examination table, counter tops and furniture with disinfectant solution.		
2. Ensured that room was well ventilated and well lighted.		
3. Ensured that doctor's sterile gown, mask, cap, and gloves were laid out.		
4. Ensured that draping sheets were ready for application.		
5. Ensured that instrument tray contained the necessary sterilized instruments covered on sterile field.		
6. Prepared necessary medication.		
7. Had sterile pick-up forceps accessible.		

APPROVED: YES ____ NO ____

Evaluator's Signature **Date**

DUTY PERFORMING CLINICAL OFFICE PROCEDURES

PERFORMANCE OBJECTIVE 68

TASK

Take and record oral temperature.

STANDARD OF PERFORMANCE OF TASK

The thermometer must be read to the correct one-tenth of a degree.

SOURCE OF STANDARD

State of Kentucky Writing Team

CONDITIONS FOR PERFORMANCE OF TASK

Oral thermometer
Temp-a-ways
Graphic sheet
Blue pen

ENABLING OBJECTIVES

1. Have general knowledge of normal body temperature.
2. Identify types of thermometers (Fahrenheit and Centigrade).
3. Be able to use a Fahrenheit thermometer.

RESOURCES

1. Shea. **Mosby's Fundamentals of Medical Assisting**, pp. 258-64.
2. Simmers. **Diversified Health Occupations**, 2nd edition, pp. 36-39, 46-48.

TEACHING ACTIVITIES

1. Present lecture on oral temperature.
2. Demonstrate the reading of an oral Fahrenheit thermometer using a thermometer demonstrating aid.
3. Instruct student to read different temperatures using a thermometer demonstrating aid.
4. Instruct student to read clinical thermometer.
5. Assign student to practice group to familiarize him/her with taking and recording temperatures.

PERFORMANCE OBJECTIVE 68

CRITERION-REFERENCED MEASURE

Practical Application

Given class discussion, the student will take and record an oral temperature reading to within one-tenth of a degree of the instructor's reading.

Method of Evaluating Practical Application

The instructor will evaluate by observation using the checklist. Each item should have an acceptable rating.

CHECKLIST FOR PERFORMANCE OBJECTIVE 68

TAKE AND RECORD ORAL TEMPERATURE

Student's Name Date

DIRECTIONS TO STUDENT	Prepare the proper equipment. Follow the verbal directions given by the instructor. Complete each step in the sequential order listed.
DIRECTIONS TO EVALUATOR	Observe the student. Pay close attention to items to be evaluated. Be sure the student completes the tasks within a reasonable time. An acceptable rating on each item is required for competency.

ITEMS TO BE EVALUATED	RATING	
	Acceptable	Unacceptable
1. Washed hands before and after handling the thermometer.		
2. Explained the procedure to the patient. NOTE: Oral temperature cannot be taken in infants, children too young to know how to hold the thermometer, patients who have difficulty breathing, or mentally unbalanced patients.		
3. Placed thermometer in mouth positioning it under the tongue. Instructed patient to close lips and neither talk nor open lips.		
4. Left thermometer in place 3 minutes.		
5. Removed, wiped with clean sponge and read.		
6. Recorded temperature.		

APPROVED: YES ____ NO ____

Evaluator's Signature Date

APPENDICES

APPENDIX A

JOB TITLES, DUTIES AND TASKS

Job Titles:
Medical Assistant (Medical Services)
Medical Asstant (Administrative)
Medical Assistant (Clinical)

DOT Number:
079.368-022

DUTY/TASK P.O./PAGE NO.

DUTY A - PERFORMING GENERAL OFFICE PROCEDURES

Place and receive telephone calls 1/5
Arrange for patient's admission to hospital 2/8
Arrange physician's travel accommodations 3/12
Schedule patient appointments 4/15
Complete registration form and prepare a medical file for a new patient 5/18
Explain doctor's fees 6/22
File letters, diagnostic reports, and progress notes in patients' records 7/25
Gather data for necessary reports regarding referrals to other doctors 8/29
Maintain an appointment reminder system 9/32
Maintain control system for medical records 10/35
Prepare release form and obtain the necessary signatures 11/38
Process incoming mail 12/41
Collate patient medical records for daily appointment schedule 13/44
Receive patients and visitors 14/47
Schedule patient for out-patient diagnostic tests 15/50
Prepare statements for mailing 16/53

DUTY B - PERFORMING GENERAL OFFICE MANAGEMENT FUNCTIONS

Arrange for maintenance and repair of equipment 17/57
Complete daily record sheet 18/60
Update the outside agency file 19/63
Update inventory list of office supplies and equipment 20/66
Prepare purchase requisitions 21/69

DUTY C - PERFORMING GENERAL ACCOUNTING PROCEDURES

Collect delinquent bills 22/73
Collect and post payments 23/76
Maintain a file of unpaid accounts 24/80
Maintain petty cash fund 25/83
Prepare bank deposit slips 26/86
Process charge slips 27/89
Prepare checks for doctor's signature 28/92
Reconcile bank statements, cash count, and receipts 29/95
Review invoices for validity and accuracy 30/99

DUTY D - COMPLETING GOVERNMENT FORMS, INSURANCE AND OTHER FINANCIAL REPORTS

Complete insurance, medicare, medicaid and reimbursement insurance forms 31/103
Complete workman's compensation forms 32/106

DUTY/TASK P.O./PAGE NO.

DUTY E - PERFORMING GENERAL LABORATORY PROCEDURES

Assist with collection of clean catch or sterile urine specimen 33/110
Assist with collection of microorganism smear 34/114
Assist with the collection of Pap smear 35/117
Assist with the collection of a randomly voided urine specimen 36/120
Assess and record color, gross appearance and odor of urine specimen 37/123
Perform cholestrol tests 38/126
Perform fingerstick blood sugar screening test (Dextro stix) .. 39/129
Perform urine pregnancy test 40/132
Perform urine specific gravity tests 41/135
Prepare specimens for shipping and requisitions for tests outside of office 42/139

DUTY F - PERFORMING STERILIZATION AND ASEPTIC TECHNIQUES

Clean and restock examination room 43/143
Sanitize instruments 44/146
Disinfect instruments 45/149
Unwrap or open sterile packages, maintaining sterility of contents 46/154
Perform handwash to decontaminate 47/157
Put on sterile gloves 48/161
Package linens for sterilization 49/165
Sterilize supplies and instruments using the moist heat method 50/169
Sterilize supplies using the dry heat method 51/172
Wrap instruments for sterilization 52/175

DUTY G - PERFORMING CLINICAL OFFICE PROCEDURES

Assist doctor with minor surgery 53/179
Assist with dressing change 54/182
Assist with proctoscopic examination 55/185
Assist with biopsy procedure 56/189
Perform visual acuity tests 57/193
Drape patient 58/196
Apply roller bandage 59/199
Apply triangular bandage 60/203
Apply tubular bandage 61/206
Control bleeding by applying tourniquet 62/209
Control bleeding by using direct-pressure method 63/212
Control bleeding suing indirect-pressure method 64/215
Care for patient who has fainted 65/218
Prepare for a catheterization 66/221
Prepare room for minor surgery 67/224
Take and record oral temperature 68/227

APPENDIX B

DEFINITION OF TERMS

APPENDIX B

DEFINITION OF TERMS

A number of terms frequently used in this guide may be unfamiliar to the reader; others may be familiar, but in the context of this handbook have been assigned special meanings.

AFFECTIVE.

Skills which emphasize an attitude, feeling, emotion, or degree of acceptance and rejection.

CATALOG.

A comprehensive collection of performance objectives, performance guides, and related data developed in a specific domain.

CBVE (COMPETENCY-BASED VOCATIONAL EDUCATION).

A methodology of instruction that (a) identifies the abilities and skills needed for on-the-job performance; (b) informs students and teachers of the precise and detailed learning objectives required to achieve these competencies; (c) emphasizes performance standards in testing, course requirements, and/or graduation; and (d) facilitates learning by letting each student master the tasks prior to advancing to another.

CHECKPOINT.

A point in the development of the V-TECS product when material must be sent to V-TECS central office for quality review.

CIP (CLASSIFICATION OF INSTRUCTION PROGRAM) CODE.

A code developed by the U.S. Office of Education to identify a specific cluster of related jobs for training program identification.

COGNITIVE.

Skills which emphasize the recall of knowledge and development of intellectual abilities.

COMPETENCY.

Proficiency in the knowledge and skills required of workers in a particular occupation or occupational specialty; a term used by educators to mean essentially program goal, duty, task, or objective. In some cases the terms are essentially synonymous.

CONDITIONS.

Describes the situation for competent task performance, including tools and equipment to be used, and limitations under which the tasks will be performed.

CONSORTIUM.

A group of state agencies, institutions, or other entities which have been legally constituted through letters of commitment, agreements, or by assignment of higher authorities to work together toward the solution of problems in education. A consortium, for the purposes of this work, must have membership from autonomous agencies and institutions which cut across state boundaries as they attempt to solve problems or meet goals.

CRITERION-REFERENCED MEASURES.
An evaluative procedure used to determine if a student has mastered a performance objective.

CROSS-REFERENCE TABLE.
A table that identifies the relationship among duties and tasks found in the occupational inventory and the performance objectives in the final catalog. Also noted are percentages of incumbents performing the tasks by D.O.T.

CURRICULUM GUIDE.
An instructional resource developed from a V-TECS catalog to guide CBVE for an occupation.

DICTIONARY OF OCCUPATIONAL TITLES (D.O.T.).
A document published by the U.S. Department of Labor, Employment and Training Administration. This publication groups occupations into systematic occupational classification structures based on interrelationships of job tasks and requirements.

DISTRACTOR.
An incorrect response to a multiple-choice or true/false test item.

DOMAIN (OCCUPATIONAL DOMAIN).
A group of job titles that are related on the basis of required skills and knowledge.

D.O.T. CODE.
A nine-digit number used to identify a specific job within a given calendar year.

DUTY.
A cluster of related tasks performed by incumbent workers in an occupational domain.

ENABLING OBJECTIVE.
An objective related to background knowledge or skills that are prerequisite to the mastery of a given task.

FIELD REVIEW.
The process of using and refining drafts of V-TECS materials for the purpose of identifying content errors or technical problems.

GUIDE SHEET.
Instructional information including the duty, performance objective, task, performance of standard, survey of standard, conditions for performance of task, enabling objectives,resources, teaching activities, criterion-referenced measures, and performance guide.

JOB.
A group of tasks performed by a job incumbent.

JOB INCUMBENT.
An individual who is currently employed in an occupation.

OCCUPATIONAL ANALYSIS (Task Analysis).

The process of reviewing elements of a job for the purpose of improving training program content across program levels of vocational-technical education.

OCCUPATIONAL INVENTORY(Task Inventory Booklet).

A survey instrument listing tasks performed and tools and equipment used by job incumbents in an occupational domain.

OCCUPATIONAL SURVEY.

The procedures for collecting data to identify the duties and tasks that comprise one or more jobs, job types, or career field ladders for the collection and analysis of information concerning such duties.

O.E./CIP CODE.

A code developed by the U.S. Office of Education to identify a specific cluster of related jobs for training program identification.

PERFORMANCE-BASED INSTRUCTION.

Instruction which requires the learners demonstration of specific competencies. The desired abilities are selected before the instruction is described and are clearly defined as observable performance objectives.

PERFORMANCE CHECKLIST.

A list of performance steps derived from the performance guide to record acceptable or unacceptable performance of each step of a task.

PERFORMANCE GUIDE (PG).

A series of steps required for performance of a task arranged in the sequence ordinarily followed.

PERFORMANCE OBJECTIVE (PO).

A statement, in precise measurable terms, of a particular behavior to be exhibited by a learner under specified conditions, including a standard of performance.

PSYCHOMOTOR.

Skills which emphasize manipulation of material or tools.

QUALITY REVIEW.

A review of content by V-TECS staff or designated representative to examine quality of content, format, and style of V-TECS product(s).

RESOURCES.

Materials which are used to develop instruction and/or learner-specific objectives.

SOURCE OF STANDARD.

A person or origin from which the information establishing the standard is received.

STANDARD.

The criteria used to determine if a task has been successfully or unsuccessfully performed.

STATE-OF-THE-ART REFERENCE.
Current materials from which information or resources can be found to facilitate instruction.

STATE-OF-THE-ART (SOA) STUDY.
Research conducted to determine the current status of performance-based instructional materials and practices in the domain area under study and to obtain other information that might be useful in catalog development.

SUBJECT-MATTER EXPERT.
A highly experienced person (incumbent worker/instructor) who assists in identifying task performance steps, skills, and knowledge necessary to perform the job.

TASK.
A unit of work activity which constitutes logical and necessary steps in the performance of a duty. A task has a definite beginning and ending point in its accomplishments and generally consists of two or more definite steps.

TASK ANALYSIS.
The process of reviewing elements of a job for the purpose of improving training program content across program levels of vocational technical education.

TASK LIST.
A list of tasks performed by incumbents in a specific occupational domain.

TEACHING ACTIVITIES.
Methods and/or procedures for delivering instructional content to students.

TEST-ITEM BANK.
A collection of criterion-referenced test items coded for input and retrieval by computer or manual methods.

VALIDATION.
The process of assuring that all aspects of an occupational.task analysis identify the skills, knowledge, and attitudes performed in the occupation.

VERIFICATION.
The procedure of collecting data to substantiate an existing product; for example, task list verification.

V-TECS.
An acronym representing: Vocational-Technical Education Consortium of States; 795 Peachtree Street, N.E., Atlanta, Georgia 30365. A consortium of states that provide competency-based, vocational-technical education materials while conserving time and money through shared development and dissemination.

V-TECS CATALOG.
An incumbent-based description of the duties, tasks, performance objectives, performance guides, and related data in a specified occupation.

WORKING CONDITIONS.

The atmospheric and environmental conditions under which a worker performs a specific job.

WRITING TEAM.

A team of people representing instructors with subject matter expertise; persons having knowledge and experience in developing criterion-referenced measures; local or state supervisors in the domain being developed; workers and supervisors of incumbent workers whose function is to analyze occupational data and develop performance objectives for specific D.O.T. areas.

APPENDIX C

EQUIPMENT AND TOOLS LIST

APPENDIX C

EQUIPMENT AND TOOLS LIST

Accounts receivable file
Adhesive bandage, small
Adhesive or masking tape (if indicator tape is not used)
Alcohol sponges
Anesthetic solution
Antiseptic solution
Appointment book
Appointment cards
Autoclave, dry heat
Autoclave indicators
Autoclave, steam-pressure
Ayer blades
Bandages, cravat
Bandage, triangular
Bandage, tubular with a wire applicator
Bath towel/drape towel
Basin lined with paper towels, tissues
Bed pan or urinal
Bottle of reagents strips
Calculator
Cash on hand ($50 or less)
Catheters
Chairs
Chalk/tape
Charge slips
Checks and cash for a day's receipts
Colorimeter
Compress, sterile or clean cloth
Computer (if office does computer billing)
Correction tape or fluid
Cotton balls
Cotton tipped applicators
Culture tubes, slides and fixative
Day sheet
Deposit slips
Detergent
Disinfectant
Draping material
Dressing tray
Disposable cups, small
Electrocantery unit and lubricated lead plate
Envelopes
Examination table stirrups
Fee schedule
File cabinets
File folder
File record
Filing system
Financial card

EQUIPMENT AND TOOLS LIST (Continued)

Finger cots
Flashlight/examining light
Forceps
Forms
Gauze sponges,sterile
Gloves, disposable
Gowns
Graphic Sheet
Hand brush and/or orange stick
Hemostat
Hemostat forceps
Instruments - sharp such as knife blades, glass rings
Instrument tray
Insufflator
Invoice
Kelly forceps, straight and curved
Laboratory requisition and label
Lancets, disposable
Ledger cards
Letter opener
Linen towels
List of repair and maintenance shops with telephone numbers
Lubricant
Midstream specimen kit
Mosquito forceps, straight curved
Needles
Needle. aspiration
Needle holder
Needle, syringe
Oral thermometer
Outer wrapper (paper or cloth)
Overdue accounts
Paper clips
Paper or muslin autoclave wrap
Paper towels
Patient ledger card and medical history file
Patients' sign in sheets
Pegboard base
Pillow, small
Pointer
Powder, oils, ointments, dressing
Pregnancy test kit, manufacturer's instructions
Probe with bulb tip
Procedure manual
Purchase order
Registration form
Requisition form
Rectal speculum
Retractors
Requisition form
Rubber date stamp and ink pad
Rubber supplies

EQUIPMENT AND TOOLS LIST (Continued)

Scalpel handle and blade
Scissors
Scrub brush
Service contracts
Sheet/drape
Sigmoidoscope
Sling
Snellen charts (letters, pictures)
Soap
Specimen container, appropriate receptacle
Statement sheets
Statement receipt forms
Sterile cotton typed applicators
Sterile field (tray with sterile towel)
Sterilization indicator
Suction pump
Surgical gown
Suture material and needle
Suture scissors
Table or other flat surface
Table paper
Tape
Telephone
Telephone book
Telephone message pads
Temp-a-ways
Tissue forceps
Toothed tissue forceps
Transfer forceps
Tray covered with towel
Tray with cover or mayo stand
Typewriter with good ribbon
Urine specimen container
Urinometer float, jar or cylinder
Uterine dressing forceps
Vaginal speculum
Voucher/check for replenishing petty cash as needed
Waste can
Watch or clock with a second hand
Water in a wash bottle and receptical for water
Worker compensation forms
Written office policy on delinquent accounts
Written shipping regulations
Yardstick

APPENDIX D

BIBLIOGRAPHY COMPILED BY THE SOUTH CAROLINA WRITING TEAM

APPENDIX D

BIBLIOGRAPHY COMPILED BY THE SOUTH CAROLINA WRITING TEAM

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